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ABSTRACT

This report by a National Task Force of the Teacher Corps provides charts, tables, and analysis of two distinct facets of previous analysis of the work of the Teacher Corps. The first is a detailed consideration of the availability and use of technical resources. Included are considerations of the purposes for providing technical resources; methods of identifying, analyzing, and setting priorities on necessary resources; and recommendations on organizational structure for delivery of resources. The second issue discussed was program evaluation. The components, purposes, and design of program evaluation are set forth, and a framework for effective evaluation is presented. Discussion is offered on governance as well as on collaborative mechanisms, rationale, and characteristics of a proposed evaluation design. (JD)

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Teacher Corps
Developmental
Training Activities

TASK FORCES / DOCUMENT II
Materials on Technical Resources and Program Evaluation

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TEACHER CORPS

TASK FORCES

Document II

Materials on

TECHNICAL RESOURCES
and
PROGRAM EVALUATION

DEVELOPMENTAL TRAINING ACTIVITIES

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FOREWORD

Teacher Corps is now engaged in a number of planning activities, preparatory to implementation of recent changes in its legislative authority. These changes center around demonstration, as an important responsibility of Teacher Corps over the next decade.

As an integral and invaluable part of its planning activities, Teacher Corps/Washington established three Task Forces, in the latter part of 1977, to develop for Teacher Corps' consideration three papers, representing the participants' ideas as to how Teacher Corps might meet its new legislative responsibilities. These groups were to work in the areas of Technical Resources, Demonstration, and Evaluation. Members came from across the nation, from the public schools, their communities, higher education, state departments of education, and the organized profession. Teacher Corps/Washington designated the chairperson and the writer for each Task Force.

Each Task Force met three times in Washington. After each session, the writer for each group was expected to digest, synthesize, and organize the two-day deliberations into a written statement. After the third and final session, the three writers and the three Task Force chairpersons prepared the overall analysis contained in Document I.

An outstanding characteristic of Teacher Corps, at the national, state, and local levels, has been the openness, the sharing, and the feeling of mutual respect which exist among the various groups most intimately involved in teacher education. These factors certainly marked the deliberations of the Task Forces.

Document I contains an overall analysis of the work of all the Task Forces, with individual reports from each of them. In this volume, Document II, the Task Forces on Technical Resources and on Evaluation provide the charts, tables, and analyses that support their more concise reports in the first volume.

Teacher Corps/Washington has been incorporating the contents of these reports into its planning process, as an invaluable resource.

The writer wishes to express deep appreciation to William L. Smith, for his continued interest in and support of the work of the Task Forces. Caroline Gillin and Gwendolyn Austin, Cycle Operations Branch, and William Moulden, Management Branch, also participated and took an active interest in the deliberations of the groups. Samuel Keys, on loan to Teacher Corps from Kansas State University, Paul Collins, Fordham University, and G. Thomas Fox, University of Wisconsin--Madison, assisted in conceptualizing and organizing this project.

The logistics and support for the Task Forces were handled by Floyd Waterman, University of Nebraska at Omaha, Center for Urban Education. Waterman is the director of the Teacher Corps Developmental Training Activities contract with that institution. The writer wishes to thank each of the Task Force participants, particularly the chairpersons and the writers, for their tireless efforts. Special thanks are also due John Savage, Edna Alexander, Joan Krager, and Camille Orgertrice for editorial assistance and manuscript preparation.

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INTRODUCTION

Late in 1977 the Teacher Corps formed a National Task Force to study that program's new rules and regulations and to consider implications of programmatic changes for providing technical resources to projects and other personnel in Teacher Corps. Most Task Force members had had varying levels of direct personal experience with the Teacher Corps at the local, regional, and/or national levels. That experience provided a base from which to consider the rules and regulations and to make recommendations related to technical resources needed to effectively implement the Teacher Corps's Program 78.

Clearly, there will be an increase in the need for such technical resources in Program 78. Programmatic changes which have caused this increase include the need to: learn how best to plan and implement a five-year project; learn how to institutionalize successful components of a project; build a better system of training educational personnel; and demonstrate effective educational practices in a grouping of multiple educational institutions.

The Task Force discussions included consideration of the purposes for providing technical resources; methods of identifying, analyzing, and setting priorities on necessary resources; suggesting when resources will be needed; recommending an organizational structure for the delivery of resources; conjecturing on delivery modes; and applying suggested strategies in sample case studies. The remaining sections of this document discuss each of these areas of discussion.

Early in the Task Force meetings the question was asked, "Why provide technical resources? Are professional educators who submit proposals not capable of carrying out the program they describe in their proposals?" The Task Force concluded that the answers to these questions are both "Yes" and "No." Some personnel are very capable of managing and delivering their proposed programs, while others seem to require help in acquiring the skills and understanding necessary to carrying out their programs. The Task Force recognized that there are purposes for technical resources which go beyond simply building skills. For example, project personnel should have support in trying to bring about policy and procedural changes in established schools and colleges.

Thus, technical resources will need to provide more than training in Program 78. Though all personnel involved in multi-institutional collaboration may be well trained, other problems will occur and must be resolved. Highly skilled, capable people will need resources to complete the process of institutionalization.

Teacher Corps is attempting to resolve some of the most difficult issues in American education. Many of the program's goals will require multidisciplinary cooperation at such widely divergent levels as within a local district and across the nation. There is no clear-cut expertise in many of the program's areas of concern; answers will have to be found during the project operation. Those answers will then need to be analyzed and shared within and across projects. Technical resources are needed to enhance this cooperation and to support personnel attempting to bring about the prescribed changes.

Marsh (1977) outlined six reasons why Teacher Corps would want to provide technical resources:

1. To build skills necessary for personnel at local, regional, and national levels to perform their tasks successfully.

2. To orient new staff to understand the history of Teacher

Corps, the purpose for Teacher Corps, the major criteria upon which programs are built, and the existing operational procedures required to manage the total Teacher Corps program.

3. To create a positive political environment in the local site where members of the LEA, SEA, IHE, and community can jointly reflect on their problems and actively seek and accept necessary changes.

4. To socialize personnel and help them feel a part of a large national movement to bring about positive changes in preservice and inservice teacher training and to improve schools.

5. To interpret and clarify existing federal policies.

6. To implement new shifts and directions nationally that are caused either by additional federal requirements or by new information generated as a result of applying new ideas in a field setting.

The Task Force defined technical resources as the process of identifying training, program, or policy needs; identifying appropriate resources to meet those needs; and selecting the most efficient and effective manner of delivering those resources.

The Task Force described the process of delivering technical resources as having three major components: 1) needs, 2) resources to meet those needs, and 3) mechanisms for delivering resources. An important feature of all the models discussed here is the fact that the activity in all three of those components is continuous. It is impossible to assess needs at one point and then to consider the technical assistance task complete. Needs will change and shift through phases of a five-year project; those needs will also change among projects as well as at the local, regional, and national levels. Resources will also change as new information and solutions are found. Finally, delivery mechanisms will change as the program evolves and resources are accumulated and refined.

Systematic methods can and should be used to analyze and forecast needs, resources, and delivery systems. Table 1 includes some suggested models for analyzing needs. Each of those models includes categories of decisions that must be made in analyzing technical resource needs.

The Task Force recognized that technical resources planning and delivery at national and regional levels should be conceptualized and treated as are other federal programs. That is, technical resource programs should be awarded through RFP's and competitive bids. Technical resource programs should have the following components in common with all projects: (a) collaboration and analysis; (b) planning and design; (c) development and adaptation; (d) small-scale field testing and revision; (e) implementation in ongoing systems; (f) monitoring, ongoing evaluation, and revision; and (g) measuring and describing impact. Local projects are, after all, mechanisms for delivering technical resources for needs identified at a local site. Possibly the only real conceptual differences between a local project's mission and a technical resource center's mission are the scope and targets of their efforts.

The remaining sections of this paper elaborate upon the components of the models discussed by the Task Force as its members studied technical resources for Program 1978 and beyond.

TABLE 1

Models/Framework for Analyzing Needs to Identify Technical Resources

A

Needs/ Problems	Resources		Planning		Development	Delivery System	Implementation	Revision	Evaluation
	Available	Needed	Content	Role Grps					
1.									
2.									
3.									
. . . n									

B

Needs	Resources Developmental Level		Program Year				
	Development	Implementation	1	2	3	4	5
1. 2. 3. n							

C

Problems/ Needs	Concept/ Definition	Sub. Obj./ Content	Delivery Mechanism	Evaluation	Delivery					Mechanism for Communication of Content
					Level	Time	Cost	Person-nel	When	
1. 2. 3. . . . n										

IDENTIFYING NEEDS

The Technical Resources Task Force believes it is important to identify instructional needs for Teacher Corps personnel whenever that is possible. Some needs will not become evident until programs are operational; likewise, some needs will be unique to a particular group or staff. Most needs, however, will be generalizable across staffs and can be predicted or forecast before the need becomes critical.

Forecasting instructional needs for technical resources will help to ensure the equitable allocation of resources across types of programs, regions, and levels of operations (local, regional, and national). Forecasting needs--and providing resources to meet those needs in an orderly manner--will increase the Teacher Corps's capability for collecting knowledge and instruction in areas considered critical to the success of its programs. This cumulative knowledge and revised organization in common areas of need should make technical resource allocation more cost-effective in future years.

The identification of needs for technical resources should provide information from which growth or impact as a result of providing technical resources can be assessed within a project and across projects.

The need for Teacher Corps to forecast needs and to provide planned skill-acquisition instruction was discussed by Marsh (1976) and Turner (1976). Marsh describes the need to identify a few critical program development processes which Teacher Corps predicts will be included in its programs; to develop effective instruction in the use of those processes; and to train key program personnel in the use of those processes before they are needed to carry out project functions. Turner proposed that many persons charged with carrying out important common tasks in a program (documentation, for example) do not know the concepts and/or skills related to planning and executing their tasks effectively. Rather than risk expensive failure--both for the individual and for the program--Teacher Corps should ensure that all staff members have necessary skills and support when they need them. In the case of documentation, that can be done by forecasting the need for expending the time, energy, and resources required to assess technical resource needs for Teacher Corps personnel at all levels. The Technical Resources Task Force recognizes that the identification and forecasting of needs should become an increasingly high priority and Teacher Corps as it looks toward planning its Program 78 technical resource allocations.

Sources for Identifying Needs

There are several sources of information which Teacher Corps can use to identify personnel inservice needs. The first (and probably most important) source is the Teacher Corps rules and regulations, which describe goals which projects must work toward, role groups that will be responsible for achieving those goals, and target groups whose behavior and environments will be affected by a project. These rules, regulations, and requirements are the same for all projects. The simple presence of a particular set of tasks in the rules and regulations and the fact that many persons across the nation will have to perform those tasks do not provide a sufficient basis upon which to name the tasks which most require and deserve support in the form of technical resources. In short, other sources of information must be considered in determining technical resources needs.

Other cautions, too, must be observed in planning technical resource allocation. For example, it is important to remember that the existence of a problem or need does not necessarily indicate a lack of skills or the need for additional training. Skills training may not always be the best solution. The best solution may be more funds, more time, better facilities, a different schedule, or any number of other adjustments. Analyzing a problem and the efficacy of its reolution through technical resources are vital issues when identifying technical resource needs.

Persons with Teacher Corps experience can identify groups of tasks required by current legislation with which they or their staffs have had difficulty in the past. They can also identify areas in which Teacher Corps had difficulty delivering training or guidelines. The Task Force experienced two examples of knowledge generated using this type of approach. One example is the reommendations from Task Force members who were (or are) Teacher Corps project personnel; a second is the product of a group problem-analysis produced by the Research Adaptation Cluster and reported by Pankratz (1977). Members from both these groups identified tasks/activities that they considered most important to achieving project goals; they also identified obstacles to achieving those goals. The Research Adaptation Cluster document is included as Appendix A. Needs identified and given priority by the Task Force group have been included in several appendices, and will be discussed later in this section.

The Task Force believes that member of the LEA, SEA, and IHE should also be a current source of technical resource needs. These groups can provide perspectives on training needs that can be overlooked by the internal Teacher Corps perspective.

Specialists for particular topics are another source of important information concerning the nature of technical resources. It may often happen that the rules and an analysis of experiences can identify areas where problems exist, but not determine their causes or specific needs. For example, the Task Force predicted that institutionalization would be a priority area for technical resources, but could not say what would be involved in providing the needed resources. In such a case, experts in institutionalization could describe the processes and theories underlying institutionalization and make recommendations as to how they would best work in a Teacher Corps setting. Some parts of the institutionalization process will require staff training, while others may already be in common use. This description should come after technical needs are prioritized and key areas have been selected for further analysis and training.

In addition to topic experts, experts in training and learning are available with experience in areas such as competency-based instructional materials planning, development, validation and implementation in large, decentralized organizations. They can recommend the best ways to plan large instructional efforts, whether the intent of the activity is to develop training skills, modify attitudes, or provide general motivation. They can also provide information on cost-effectiveness, distribution, reuse, and other key issues.

Proposals for interim funding and final evaluation reports should also provide information from which to forecast and plan needed technical resources. Current and past evaluation reports at local, regional, and national levels should provide information concerning unachieved goals and areas where additional staff skills may have made a difference.

Proposals from newly-funded projects will describe key content areas of interest, needs of target groups, and needs of participating institutions. This information could be categorized and synthesized to forecast areas where technical resource allocations should be made.

The Task Force suggests that further studies be undertaken to analyze the mission and staff instructional needs in all regional offices and in the national office. The rules and regulations (and often the Task Force) focused on local project goals and activities--not because of a lack of interest in regional or national groups and their needs, but because of a lack of adequate information concerning the technical resource needs of regional and national staff members. The mission and goals, the current problems, and the skill levels of these groups need to be assessed before forecasting technical resource allocations. The Task Force recognizes that the nature and mission of regional offices may change for Program 78, and stresses the importance of having knowledgeable, skilled, and effective personnel in the national and regional offices. Their ability to carry out their missions effectively will affect the efficiency of projects across the country. The Task Force views these as key personnel for analysis of needs and provision of technical resources.

Conceptualizing Types of Needs

As it conceptualized technical resource needs, the Task Force found that directly focusing on the Teacher Corps rules and regulations provides a narrow view of global Teacher Corps operation strategies. That view expands, however, when attention is divided among the local, regional, and national offices. Both similar and dissimilar activities are carried out at these three levels; for example, all three levels must plan, budget, organize, staff, develop, and validate programs. On the other hand, differences occur in the target groups affected by each level. The National group plans, monitors, and evaluates the activities of regional and local projects, while regional offices may plan, monitor, and evaluate local projects; local projects, meanwhile, are primarily responsible for such activities within their project. The staff of each of the three levels will need technical resources.

There are different types of staff members at the three levels. These staff members have varying degrees of expertise and differing terms of employment with Teacher Corps. Since Teacher Corps is a temporary organization at the project site, local staff members are often tenured in or primarily responsible to another organization, such as a school district, a state department, or a university. Many staff members are employed for a day, a week, or a two-year period. Some will be employed for a five-year period during Program 78 projects. These differing time investments will cause special types of technical training needs and problems in providing for those needs. The duties and longevity of staff members must therefore be considered when planning resource allocation.

The temporary nature of Teacher Corps staff members suggests that technical resource needs may be derived from this condition. Staff members will have orientation, organizational development, start-up, inservice, and closure needs. These needs are described in Table 2.

The orientation column in Table 2 includes the development of a positive political environment, socialization of a project into the larger Teacher Corps family, and interpretation and clarification of existing federal policies which were discussed by Marsh (1977). Marsh's "technical needs" category is comparable to the start-up and inservice skills phases.

Marsh (1976, 1977), Turner (1976), and the Task Force have all indicated that training in technical skills alone will not provide the breadth necessary to comprehend, design, and provide technical resources to meet the special needs of Teacher Corps personnel. Skills acquisition must be an important part of Teacher Corps training; so are the socialization skills necessary to becoming acclimated to Teacher Corps and to carrying on after the grant has been phased out.

TABLE 2

Activities included within Training Phases

Orientation (Socialization	Start-up (Hard skills)	Inservice (Motivation - Hard skills)	Closure (Socialization - Hard skills)
What is TC?	Planning my part	Shifting roles/ responsibilities	Institutionalizing/ sharing ideas, products, procedures
What is my role?			
What is expected of me?	Developing/ securing my part	Learning new interpretations/ goals/needs	Maximizing my TC experience for myself/ my career/my organization
What can I expect now?	Field testing/ adapting my part	Learning new research ideas/ technology	Relocating into a related effective role/job
What can I expect in 3-5 years?			
What have others done in TC?	Meeting and interacting with my peers	Learning more effective procedures	
What are others doing in this project/other projects?	Learning what I will need from others	Expanding role within project/ region/nation	
What is the national movement of Teacher Corps?	Learning what others will need from me		
Committing to join TC movement.			
Committing to work toward TC goals			

Prioritizing Needs

The Task Force recognized that technical resource needs should be schematically classified and prioritized in order to identify the most crucial needs from among the hundreds of problems, tasks, and skills considered important for Teacher Corps personnel at all three levels. Several methods of prioritizing needs were suggested; these include the following:

1. Subsuming tasks into larger sets or groups of tasks.
2. Ordering the set of tasks according to which are most critical to the overall success of a project or program.
3. Rating the importance of a person or role group according to the overall effect he/she would have on the success of the project or program.
4. The timing of the task (i.e., start-up, planning, implementation, etc.) in relation to effectively carrying out project goals.
5. The frequency with which a task is performed with a project or program in various locations.
6. The number of persons with a pronounced need to perform a set of tasks.
7. The cost-effectiveness of providing technical resources from a regional or central office, as compared with local or on-the-job training strategies.
8. The number of persons that can effectively be reached through a technical resource activity in one time and place.

The group's prioritization of needs was not based on any one of these selection strategies. Rather, a combination of strategies was used to select suggested priority areas.

Groups of skills were classified by the Technical Resources Task Force, and have been included as Appendices B through G. They are included in this report to illustrate the belief that many different classification schemes may be used as a basis for organizing areas of need and then prioritizing and providing resources.

Appendix B includes needs specified in the Teacher Corps rules and regulations for named role groups. Appendix C includes tasks related to project start-up activities that were identified from the rules and from the experience of Task Force members. These tasks are mainly directed toward project administrators.

Appendix D includes needs specified as project administration/management, and were identified from the rules and Task Force members.

Needs related to the content and curriculum of projects are included in Appendix E. One set of those needs was identified by the Task Force; the second was identified and submitted by Dwight Allen.

Appendix F includes needs related to project evaluation; those needs were identified from the rules and by Task Force members. It should be remembered that these evaluation activities are appropriate for the mission of a single project or for the mission of a regional grouping of projects.

Appendix E includes needs classified using criteria from the Teacher Corps rules. These include the four major criteria, the five givens, and management.

As a first step in classifying technical resource needs, role groups and their assumed responsibilities were identified from the rules and regulations. The roles suggested are included in Table 3; they represent persons in the IHE, the LEA, and the SEA. After studying those roles, further role group priorities were identified, using the responsibilities each group would have in the overall success of the project. Using that guideline, the project director and project administration (PDS and/or evaluator) are identified as key personnel in the collaboration, planning, and design of the project. Their skills and attitudes--and the total environment they create in the project--will affect all other role groups and project tasks. For this reason, the project administration staff should receive the highest priority for

TABLE 3

Positions Described in the Teacher Corps Rules as Involved in the Collaboration, Planning, Maintenance, and Evaluation of Teacher Corps Projects

Institution of Higher Education (IHE)	Local Education Agency (LEA)	State Department of Education (SEA)
Dean		
Project director*	Central administration (Superintendent)	Representative(s) of SEA
Project administration*	Coordinator for inservice within district	
	Principal	
	Coordinator for district inservice within site school(s)	
Teacher education faculty	Classroom teachers	
	Teacher-intern team leader	
	Teacher-interns	
	Educational personnel (counselor, curriculum coordinator, supervisors)	
	Volunteers in instructional program	
	Community council members	

*The project director and project administration can be employed by the LEA if it is the grantee.

intensive technical resource allocation early in the project. They should receive training independently within a role group, and together as an administrative team charged with implementing new strategies in local projects.

Technical resources in administrative skills must, then, be planned and provided. That will require designing and providing instruction and activities for all project administrators. Since the Task Force identified that need as the highest technical assistance priority, it is suggested that technical resources be allocated immediately for activities to plan, develop, and provide the necessary administrative training. This suggestion is based upon the shortness of time before the beginning of Program 78 and the critical need for project administrators to begin their activities as effectively as possible.

Other key personnel who should receive priority status in technical resource activities are program specialists and any others from the Washington office who will have direct contact with project administrative staff. The selection of the Washington group as a priority target for technical resources is based upon that group's immediate role both in helping projects at the outset of local activities and in providing a key link between the Washington office and local projects. They may need additional skills to help project directors plan, design, and monitor project efforts during the initial phases of the project.

Administrative members of collaborating institutions are another group of key project members who should receive early orientation and perhaps even skill-building activities early in the project. These activities should occur at the orientation level soon after project funding has been announced. Skill building activities may be delayed. These persons would include members of the advisory council, such as deans, district administrators, and the chairperson of the community council.

Table 4 includes a time-line from the spring of 1978 through the fall of 1979. Using projected project activities that would most likely be happening at certain points on that time-line, the Task Force identified role groups that should be receiving technical resources at specified times. During the spring and summer of 1978, immediately following project awards, the two most likely role groups for technical resources are program specialists and project directors. (It is not likely that other personnel will be recruited and hired at this point.) During the summer project administrative staff (such as program development specialists and evaluators) and the executive council should be available to receive technical resources. Although role groups are identified separately in Table 4, the table does not mean to imply that cross-group activities would not make an effective, even desirable, mode.

The fact that these groups are available and working during the summer preceding the planning year will help to focus technical resources on appropriate skills and activities for those people. The national technical resource effort in the start-up summer of 1978 should be focused on those role groups, rather than on interns, classroom teachers, team leaders, instructional program implementers, or community personnel, as has been the practice in the past. These people will probably not be hired or join the project until the following year. Table 4 suggests that activities for persons in these role groups, if provided at all, be scheduled for the summer of 1979.

Further, the CMTI program that has been provided for interns and team leaders each summer should be deferred for the summer of 1978. It could, however, be replaced with another intensive institute for role groups which have more potential impact on the success of the project in its early stages. Demonstration, institutionalization, and inservice training activities require expertise from role groups other than in-

TABLE 4

Time Line for Prioritizing Technical Resource Allocation during the First Two Years of a Project

Spring '78	Summer '78	Fall '78	Winter '78	Spring '79	Summer '79	Fall '79
National office program specialists Project directors	National office program specialists Project directors Project administrators Members of the executive council College faculty /administration	Project administrators Program designers/ adapters/ developers/ evaluators Coordinators for district/ university inservice programs	Project administrators Program designers/ adapters/ developers/ evaluators Members of the executive council	Project administrators Program designers/ etc. Members of the executive council	Intern team leaders Interns Community Council member Program implementers (IHE faculty) Classroom teachers	Community Council members

terns. The amount of technical resources focused during CMTI and the national conference on the intern role group should be reconsidered.

It is recommended that, among the classification schemes identified, those related to start-up activities, organization development processes, administration, and evaluation receive highest priority because of timing criteria. That is, these skills will be needed first by those charged with conceptualizing, designing, and beginning each project.

Following a close second to these groupings are those tasks related to the four major criteria and the five givens. These tasks are given second priority because there is considerable overlap between required administration skills and the criteria/givens from Teacher Corps rules. Those tasks related to curriculum and program planning and development are recommended as a third area of priority.

Fourth, tasks related to role groups entering the project at later points should be considered. These tasks are related to interns, team leaders, classroom teachers, community members, and so forth. Most of the activities related to project personnel (such as university faculty, interns, classroom teachers, and community members) may be done on site through local technical resource funding and other efforts. It may not be advisable to embark on national or regional training efforts for these groups in skills acquisition areas. However, attitude development, orientation, or other such activities should be treated differently.

TARGET GROUPS
FOR TECHNICAL RESOURCES TRAINING AND ACTIVITIES

It is important to forecast technical resource needs for particular role groups at specified Teachers Corps program levels. Many decisions must be made prior to equitable allocation of available resources. In order to understand better who the target groups for technical resources will be in the next several years, the Task Force analyzed the role groups at the local, regional, and national levels; the projected number of persons in each role group each year; training needs based on project phases (year one through year five) for each year; and the groups that will be working directly for Teacher Corps and those that will be cooperating with Teacher Corps.

Role Groups at Various Levels of Teacher Corps Programs

Five different levels of personnel were identified as being associated with Teacher Corps. Each of these levels has personnel performing various tasks and duties. Some of those tasks are general across levels, while others are more related to a particular level. Level I includes all personnel working in the Washington Teacher Corps office. People working outside the national office in regional or national centers make up Level II. This level includes regional network offices, national content-specific offices, and special training offices. These offices are unique in that they serve the needs of many local project offices, the needs of each other, and the needs of the Washington office.

Level III includes local project administrative staff, such as directors, program development specialists, evaluators, and others charged with managing project activities. These persons are hired by local Teacher Corps projects and receive all or part of their annual salaries from either contracts of grants funded by Teacher Corps/Washington.

The group of persons at Level IV is also found in local projects. One difference between the persons at this level and those at Level III is that they are generally not directly hired through Teacher Corps funds, but do benefit in other ways from participating in a project. Their major allegiance is to another institution, such as the IHE, LEA, or SEA. Another difference is that members at Level IV rarely spend the majority of their work time on project-related activities. They have key roles in the success of the project, but may not be directly associated with it.

Level V includes target groups for project activities. These are pupils, interns, classroom teachers, school educational personnel, and parents and other community members. Except for interns, these groups are not paid directly through Teacher Corps funds. Rather, they are the recipients of Teacher Corps training and activities.

Table 5 lists the major role groups at each of the five levels. This listing illustrates the fact that some project tasks are performed across personnel levels. For example, administrative tasks such as planning, budgeting, recruiting, hiring, and personnel management are common to Levels I through III. It might, therefore, be very effective to provide cross-group, cross-level training in areas related to those functions. The same generalization also applies to other tasks, such as program planning and development, evaluation, and support activities. However, most tasks are not readily generalizable from Levels I, II, and III to Levels IV or V, or between Levels IV and V.

TABLE 5

Five Levels of Teacher Corps Program and the Role Groups Associated with Each Level

Level	Role Groups/Tasks	
I National Office	Administration Program Dev. Evaluation Support Technical Resources Consultants	
II Groupings of Projects (Regional, Content, Need, etc.)	Administration Program Dev. Evaluation Support Technical Resources Consultants	
III Local Project Administration Team	Administration Program Dev. Evaluation Support	Consultants Site Coordinator? Community Coordinator? Team Leader
IV Local Project IHE, LEA, SEA Professional Educator's/Adm.	Dean IHE Faculty IHE LEA Supervision LEA Inservice Site Principals	Advisory Council Community Council SEA Representative Consultants
V Local Project Target Groups	Pupils Teachers Community/Parents	School Educational Personnel Volunteers Interns

The Number of Individuals Associated with Each Level

The relative number of persons associated with various roles across the five program levels increases from the national office down through the site schools. That is, the fewest persons to receive technical assistance are at the national office level. Further, replacement of personnel in this group will be minimal and will occur in a staggered fashion. Large-scale orientation and start-up will not be necessary for this group after initial orientation to new rules and procedures.

The next smallest group consists of personnel associated with regional or other specialized offices. Planning and delivering technical resources for these two groups could be undertaken relatively easily, since there are not many different types or numbers of personnel to be considered. Once training related to orientation and start-up activities is accomplished, the majority of technical resource activities for these staffs can be devoted to inservice for new directions and responsibilities.

Activities for local project administrators will be more complex than those for other roles because of the crucial role that group plays in the overall success of the project, the large number of persons involved, the wide spread of geographical locations to be served, and the wide variety of content goals and unique situations at each site. Careful planning is required to adequately design, obtain, and deliver technical resources to all personnel within this level in an equitable fashion. A subsequent section of this paper will address that issue.

Level IV has more target personnel than Level III. The large number of people involved in this group and the variety of site locations suggest that activities for this group--both in skill acquisition and in orientation--will have different guidelines than those provided for project administrators. Some technical resources at this level can be provided on site by project directors and other administrators. Some role groups may be treated differentially in allocating technical resources within the Level IV group. Deans, for example, may be gathered in a central location, while IHE faculty might participate in inservice at the home site.

One way to plan technical resources for personnel in Levels IV and V is to sponsor most of their skill acquisition either at the site or within a region. Certainly the skill acquisition training for classroom teachers, community members, and

TABLE 6

A Forecasting Table to Illustrate Potential Persons for Technical Resources Locally, Regionally, and Nationally from 1978 to 1986

Project Phase Year		I	II	I	II	I	II	III	I	II	III	IV
Year		1978		1979		1980			1981			
Project Year		P'78	C-12	P'79	P'78^2	P'80	P'79^2	P'78^3	P'81	P'80^2	P'79^3	P'78^4
Level I National	Administration	10 →	→	→	→							
	Program	8 →	→	→	→							
	Evaluation	10 →	→	→	→	→						
	Support	20 →	→	→	→	→						
	Other	65 →	→	→	→	→						
Level II National Groupings	Administration	30 →	→	→	→	→						
	Program	14 →	→	→	→	→						
	Evaluation	14 →	→	→	→	→						
	Support	21 →	→	→	→							
	Other		→	→	→							
	Consultants		→	→	→							
Level III Local Project Teacher Corps	Directors	80	60	40	80	40	40	80	40	40	40	80
	Program Dev.	80	60	40	80	40	40	80	40	40	40	80
	Evaluation	80	60	40	80	40	40	80	40	40	40	80
	Support	80	60	40	80	40	40	80	40	40	40	80
	TC Personnel	240	180	120	240	120	120	240	120	120	120	240
	Other		→	→	→							
Level IV Local Project (non TC)	Dean IHE	80 →	→	→	→							
	Faculty IHE	400 →	→	→	→							
	Dist. LEA Sup.	160 →	→	→								
	Dist. LEA Inserv.	160 →	→	→								
	SEA Inservice	80 →	→	→								
	SEA Grants	80 →	→	→								
	Other	? →	→	→	→							
Level V Local Project	Teachers	4,000 →	→	→	→							
	Interns	320 →	→	→	→							
	Community/Parents	4,000 →	→	→	→							
	School Ed. Personnel	800 →	→	→	→							
	Pupils	40,000 →	→	→	→							
	Other	? →	→	→	→							

TABLE 6

(Continued)

I	II	III	IV	V	II	III	IV	V	III	IV	V	IV	V	V	
1982					1983				1984			1985		1986	
P'82	P'81^2	P'80^3	P'79^4	P'78^5	P'82^2	P'81^3	P'80^4	P'79^5	P'82^3	P'81^4	P'80^5	P'82^4	P'81^5	P'82^5	Total=
												→	→	→	
												→	→	→	
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											→	→	→	→	
											→	→	→	→	
											→	→	→	→	
											→	→	→	→	
40	40	40	40	80	40	40	40	40	40	40	40	40	40	40	1180
40	40	40	40	80	40	40	40	40	40	40	40	40	40	40	1180
40	40	40	40	80	40	40	40	40	40	40	40	40	40	40	1180
40	40	40	40	80	40	40	40	40	40	40	40	40	40	40	1180
120	120	120	120	240	120	120	120	120	120	120	120	120	120	120	3780
												→	→	→	
												→	→	→	
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											→	→	→	→	
											→	→	→	→	

interns is the responsibility of local project personnel at Levels III or IV. Orientation activities may be sponsored jointly through local projects, regional activities, or national conferences and workshops.

The projected number of persons associated with a particular role group will help to form the basis of decisions about how to allocate resources among groups. Table 6 contains a role group projection chart, which is one method that can be used to predict how many persons will be available in various role groups during different years. The section dealing with Level III, project administration, has been completed to illustrate how such a chart can be used. These numbers are based upon current projections that there will be 80 new projects in 1978 and 40 new projects each year between 1979 and 1982. Each year a new set of project directors will join those already in projects at various stages, creating a geometrical progression. Assuming that all project directors are eligible targets for some sort of technical resources each year, there is a cumulative total of 1180 directors eligible for resources between 1978 and 1986. These same numbers are appropriate for other project administrators, such as program development specialists, evaluators, site coordinators, and so forth. The training of all these key personnel is important, since project directors are rarely full-time personnel and the planning and operation of many key project activities are often the responsibility of other project administrators.

It is assumed that there will not be such a large number of sites or personnel for Levels I and II. In addition, there will not be the phenomena of new-starts that would require the replication of specified types of instruction over the time period. It can safely be predicted that the numbers of Level I personnel will remain fairly constant. Some growth or other changes can be expected in Level II staff and operations as needs and emphasis change over the time period. Orientation and maintenance types of activities will thus be required. However, repetitive new-start activities on a large scale are not expected. In Levels III, IV, and V there will be extreme changes in personnel and requirements, due to the addition of at least 40 new projects each year and the varying nature of tasks related to each project year.

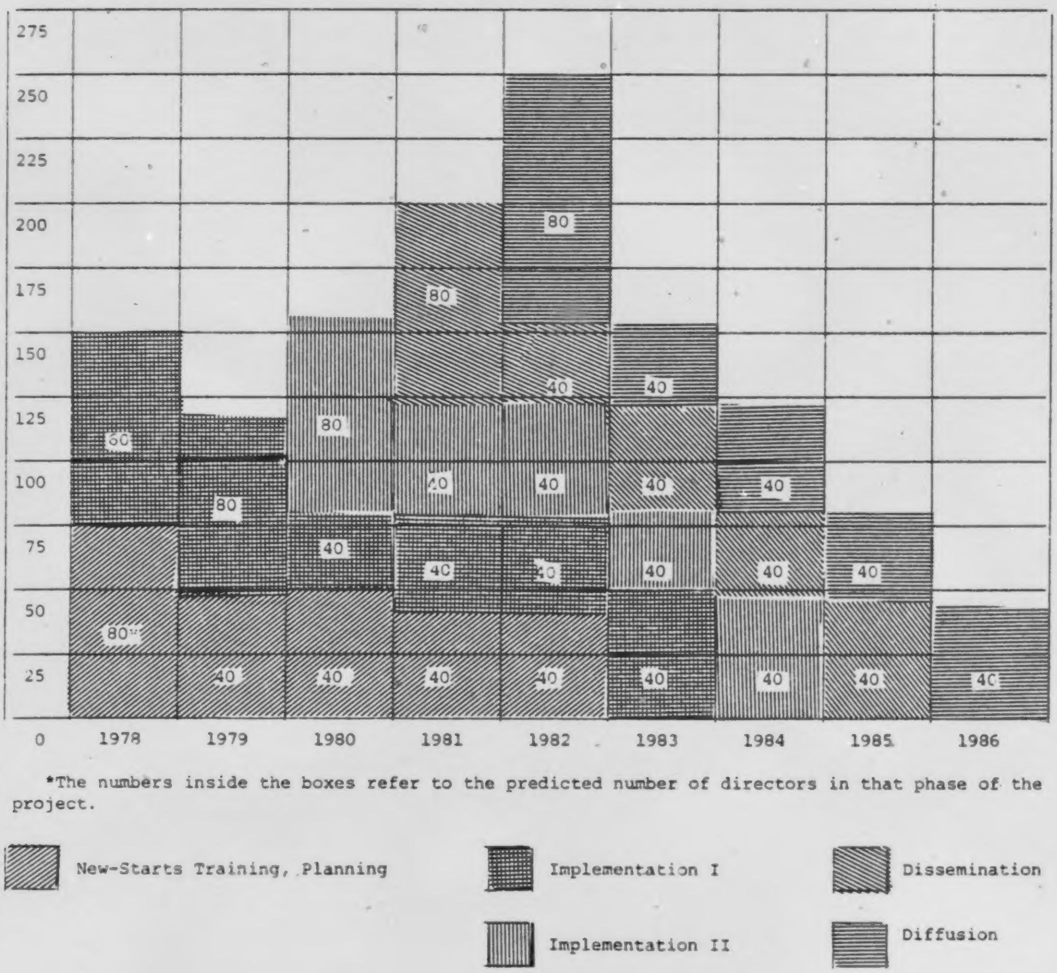
The type of forecasting illustrated in Table 6 can be further refined by projecting the number of staff in any particular year in a particular phase of the project. Activities and issues related to new-starts and the planning year can be expected to be substantially different from those for the second implementation/adaptation year, the third implementation/maintenance year, the fourth dissemination year, and the fifth diffusion year. This type of analysis is illustrated in Figure 1, using project directors as an examplar role group. During 1978, it is predicated that there will be 140 project directors. Of those 140, 80 should be receiving new-start and planning assistance, while 60 Cycle XII directors should be receiving implementation and institutionalization assistance. By adding the numbers in any date column, one can determine the different phases projects will be in and the number of directors associated with each phase. For example, in 1981, 40 directors will need new-start/planning assistance, 40 will need implementation/maintenance assistance, and 80 will need dissemination assistance. Hence, a single focus on technical resources for project directors in 1978 would not be appropriate.

There is another important point illustrated in Figure 1. By reading across years, one can see that the same type of training will be replicated at least five times. New-start/planning acitivities are appropriate annually from 1978 through 1982. Once instruction is developed/adapted and provided, it should be kept, refined, updated, and replicated for new project directors each year. The same is true for administrative training for other phases of the project.

Analysis of the different role groups and combinations of role groups at different levels--and the numbers and locations of personnel to receive technical assistance at all five levels--will help in planning and allocating technical resources in an equitable manner. This type of forecasting also helps make technical resources more cost-effective and timely.

FIGURE 1

An Example of the Different Phases of Technical Resources for Project Directors and the Number of Directors Involved from 1978 through 1986



*The numbers inside the boxes refer to the predicted number of directors in that phase of the project.

PREDICTING WHEN TECHNICAL RESOURCES WILL BE NEEDED

There are several concerns about the timeliness of technical resources. After-the-fact activities or assistance can sometimes be beneficial--and is at times unavoidable. It should be avoided, however, if at all possible. One strategy for avoiding untimely resources and assistance is to analyze and forecast the times when resources would be most beneficial to the Washington office, regional offices, and local projects.

This section includes ideas for forecasting when particular types of resources will be most needed. It includes time x task x role group analysis charts and suggests implications of this type of analysis for scheduling the provision of technical resources.

Forecasting at the Local Project Level

Several factors impact upon forecasting of times when particular types of technical resources will be needed for particular role groups. At the local project level, three key factors include the predicted time-lines for the project, the general types of activities expected during different phases of the project, and the role groups involved in projected activities during each phase. By projecting when specified role groups might be required to perform certain activities, a plan for scheduling certain technical resources can be developed. It should be remembered that technical resources should be delivered at times preceding the activities which personnel are expected to carry out. Table 7 includes a sample role group x type of technical resources x time projection form. Staff members who may be

TABLE 7

A Sample Role Group X Type of Technical Resources X Time Required Planning Chart at the Local Project Level

			Announce				Fund	Year 1 Planning												Year 2 Implementation										
	JAN 78	F	M	A	M	J	Jl	Ag	S	O	N	D	JAN 79	F	M	A	M	J	Jl	Ag	S	O	N	D	JAN 80	F	M	A	M	J	Jl
Orientation			A*		AC			FP								TL FI	S		I		CC	P									
Start-Up				A	AC			AC FP								TL FI	S		I		CC		P								
Inservice										A		AC	FP							I	AC	A		TL	FL		A	AC CC		TL	FI
Closure																	FP														

	Year 3 Implementation												Year 4 Impl./Dissemination/Diffusion											
	Ag	S	O	N	D	JAN 81	F	M	A	M	J	Jl	Ag	S	O	N	D	JAN 82	F	M	A	M	J	Jl
Orientation																								
Start-up																								
Inservice	AC CC					FL	TL		AC CC			FI		AC CC				FI			AC CC			FI
Closure							I			I														

	Year 5 Impl./Dissemination/Diffusion										
	Ag	S	O	N	D	JAN 82	F	M	A	M	J
Orientation											
Start-up											
Inservice		AC CC									
Closure					FI			A	AC CC	P T	

* A = Project Administration (Director, Evaluator, Program Planning/Mgt.)
S = Project Staff (Community Coordinator, Site Coordinator)
FI = Instructional Staff (Implementation)
FP = Instructional Staff (planning) for community, teachers, interns, etc.
CC = Community Council
I = Interns (Continuous 2nd through 3rd. Year)
P = Parents
T = Teachers (Continuous 2nd through 3rd. Year)
AC - Advisory Council
TL = Team Leader

*Role groups from local projects could receive technical resource aid as a team as well as individually.

expected to work in a local project are listed at the bottom of the table. Types of technical resources are listed down the left side, and months of the year throughout the duration of the project are listed sequentially.

To use the form, it is necessary to predict first when certain role groups will be hired and when they will begin to work with a project. For example, projects in Program 78 should be selected around March of 1978. In this time sequence, project directors will be available for orientation and start-up activities at least by the month of April. Collaboration among invested groups should begin early in the course of a project; thus, the advisory council should be available for orientation activities at least by May. The project will be funded by July; thus program planning personnel should be available for orientation and start-up activities no later than the beginning of August of the first year. Using this same type or prediction, one can insert each role group into orientation and start-up activities in appropriate months. It is also important to provide follow-up for technical resources in local projects to help personnel apply new skills and ideas in their local settings. This follow-up and feedback activity must be planned and carried out early in a project if it is to be effective.

Inservice activities should occur prior to changes in project emphasis or national requirements. For example, projects will switch from a planning mode into an implementation mode during the summer of the second year. Inservice activities related to that switch should occur prior to the second summer and should be provided for administrative staff charged with planning and executing the switch. This inservice for administrators is indicated in the planning chart for March, 1979.

Technical resources related to closure activities for various role groups can also be loosely predicted. For interns, this may mean locating professional teaching positions in schools or decisions about additional graduate study after their Teacher Corps work is complete. It is predicted that interns will be finished with the project in June of 1981. Closure activities could thus be scheduled in February and May of 1981.

By looking down the column for any month, one can see all the various role groups that will be initiating specified types of activities within a project. In May, 1979, it appears that project staff such as a community coordinator and a site coordinator will be hired and ready for orientation and start-up activities. In addition, instructional staff who designed, secured, and adopted the program during the planning year will be ready for closure activities. This may involve leaving the project for employment elsewhere, or assuming a new role within the project.

A new set of projects will enter the Teacher Corps organization each year. In 1979, all the activities projected for all the role groups during the planning year for Program 78 projects will begin again for Program 79 projects. One can thus visualize superimposing the Program 79 project staffs and activities onto the Program 78 planning sheet. Table 8 has superimposed Program 79 activities onto Program 78 analysis. Using that table, one can determine the types of activities that are going on within these two groupings of projects during any given month. For example, during April, 1980, the team leaders for Program 79 will be ready for orientation and start-up activities; the instructional implementation staff from Program 79 will be ready for start-up activities; and the advisory council and community council from Program 78 will be ready for inservice activities through which they will analyze the first project year and plan adjustments for the second year. As each new set of projects enters in subsequent years,

TABLE 8

A Sample Role Group x Type of Technical Resources x Time Required Planning Chart at the Local Project Level Completed for Program 1978 and Program 1979

			Announce				Fund	Year 1 Planning											Year 2 Implementation											
	JAN 78	F	M	A	M	J	Jl	Ag	S	O	N	D	JAN 79	F	M	A	M	J	Jl	Ag	S	O	N	D	JAN 80	F	M	A	M	J	Jl
Orientation			A*		AC			FP							Ⓐ	FI TL	(AC) S		I	(FI) I	CC	P						(TL) (FI)	Ⓢ		Ⓘ
Start-Up				A	AC			FP								TL FIⒶ	(AC) S		I	(FI) T			P		(CC)			(TL) (FI)	Ⓢ		Ⓘ
Inservice										A		AC	CC		A					I	AC CC	Ⓐ A		(AC)	(FI) FI		Ⓐ A	AC CC			FI
Closure													FP				FP												(FI)		

		Year 3 Implementation											Year 4 Imp./Dissemination/Diffusion											
		Ag	S	O	N	D	JAN 81	F	M	A	M	J	Jl	Ag	S	O	N	D	JAN 82	F	M	A	M	J	Jl
Orientation		Ⓣ	(CC)	Ⓟ																					
Start-Up		Ⓣ			Ⓟ																				
Inservice		Ⓘ	AC CC	(TL) (CC) Ⓐ		(TL)	(FI) FI		Ⓐ	(AC,CC) AC,CC		TL	(FI) FI		(AC,CC) AC,CC				(FI) FI	TL		(AC,CC) AC,CC			(FI) FI
Closure								I			I									I	I (TL)	Ⓘ			

		Year 5 Impl./Dissemination/Diffusion												
		Ag	S	O	N	D	JAN 81	F	M	A	M	J		
Orientation														
Start-Up														
Inservice			(AC,CC) AC,CC				(FI)	(AC CC)						
Closure							FI		A	AC CC	P T			

A = Project Administration
S = Project Staff (Community Coordinator, Site Coordinator)
FP = Instructional Staff (Planning) for Community, Teachers, Interns, etc.
FI = Instructional Staff (Implementation)
CC = Community Council
I = Interns (Continuous 2nd through 3rd Year)
P = Parents
AC = Advisory Council
TL = Team Leader

*Role groups might receive technical resource aid in teams that include various role groups within team.

the type of instruction needed at specified times can be superimposed on the planning chart.

It is important to determine when specified activities should be provided before designing a schedule for offering various types of technical resources. Everything cannot be offered to everyone at all times. Groups and types of activities will need to be staggered across time so that maximum efficiency can be achieved with available technical resources, personnel, and materials.

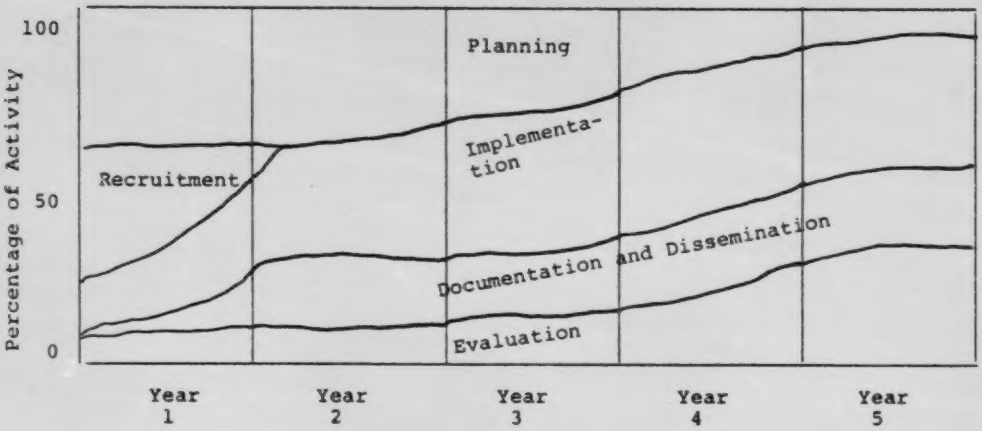
Once an activity chart for local project staff is complete, it is possible to plan on one hand which tasks may require technical resources and, on the other, which technical resources may be best delivered by the local project, a regional office, or through a national effort such as a national conference on a CMTI.

A calendar is proposed to help conceptualize when certain types of general project activities will occur. The calendar in Figure 2 illustrates that several different categories of activities are ongoing throughout the five years of a project. However, there is more emphasis in some activities than others during given years. For example, resources in collaboration, recruitment, planning, implementation, documentation, dissemination, and evaluation are appropriate during the first year of a project. The only area that drops off prior to the second year is recruitment.

Planners forecasting technical resources must work backwards in time from the implementation date of tasks within a local project to the planning and implementing of technical resources from whatever source. For example, an orientation program for all Program 78 directors might be planned for one to three days around March, 1978. It would be necessary to begin work in 1977, or January, 1978, by undertaking the orientation, collaboration, program staffing, planning, design, field test, and

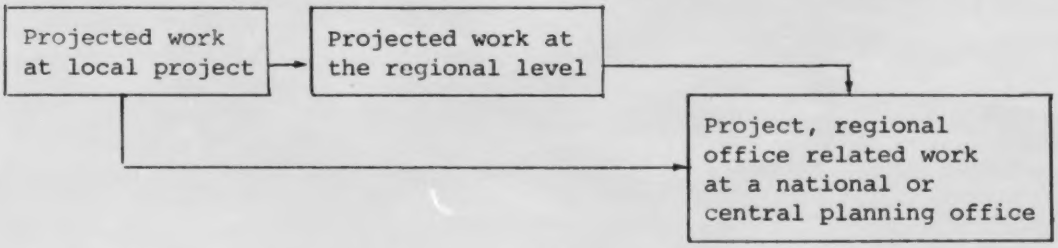
FIGURE 2

An Activity Focus for Projects across the Five Years of Operation

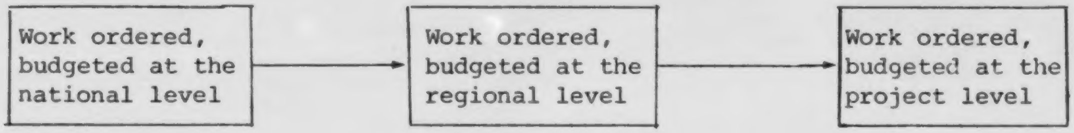


logistical support in advance. The implication of this retrospective planning strategy is clear: if such orientation for directors is to be planned, it should be in the conceptualization stages at this time.

A technical resources work projection calendar can be designed for the national office based upon projections at the local and regional levels, as follows:


Projected work at local project
Projected work at the regional level
Project, regional office related work at a national or central planning office

Although one often works from the local level through the national level in forecasting and design efforts, the actual occurence of events is in the opposite direction, thus:


Work ordered, budgeted at the national level
Work ordered, budgeted at the regional level
Work ordered, budgeted at the project level

Forecasting at a Regional or Central Level

Table 9 illustrates how planning for local project activities can lead to decisions about when certain activities should take place at regional or central training offices. If those activities occur in a local project in March or April and are a regional technical resources responsibility, then they will be assigned work for the regional staff for several months in advance.

The legend for projected staff members and project phases is included at the bottom of Table 9. As that table indicates, regional staff must receive any technical assistance necessary to carrying out their jobs effectively well in advance of the time when they are to provide technical resources for local projects or other offices. Technical resources staff should thus receive resources relative to orientation, organizational development, start-up, and the planning year early in the spring of 1978. They in turn must ingest training and activities, and then provide resources for Program 78 project directors and other administrative and advisory staff during late spring and early summer of 1978.

While staff in technical resource offices are providing one type of activity which they have located and are circulating, they should immediately begin to receive instruction themselves in conceptualizing and planning the next phase of training. At the time they begin to circulate technical resources for project planning phases, they should also be receiving instruction themselves in planning change-over strategies and implementation skills. The second cluster of training in Table 9 (September, 1979, through November, 1979) represents the training of technical resource personnel in implementation, or Phase II strategies. They in turn gather materials and resources in implementation strategies in December through April, 1979. They then begin to circulate and provide these resources to project administrators in May, 1979, carrying that effort through Au-

TABLE 9

A Sample Group x Time x Task Planning Chart for Providing Technical Resources to Personnel in Technical Resource Centers

	I							II									
				Announce			Fund	Year 1 Planning									
	JAN 78	F	M	A	M	J	Jl	Ag	S	O	N	D	JAN 79	F	M	A	M	J
Orientation				A*	E PD	MC MA	CM CA											
Start-Up				A	E PD	MC MA	CM CA											
Inservice					A				E,PD A	MC MA	CM CA							
Closure																		

	III												
	Year 2 Implementation												
	Jl	Ag	S	O	N	D	JAN 80	F	M	A	M	J	Jl
Orientation													
Start-Up													
Inservice			A,E PD	MC MA	C, CA								
Closure													

	IV										
	Year 3 Implementation										
	Ag	S	O	N	D	JAN 81	F	M	A	M	J
Orientation											
Start-Up											
Inservice		A,E PD	MC MA	CM CA							
Closure											

	V												
	Year 4 Impl./Dissemination/Diffusion												
	Jl	Ag	S	O	N	D	JAN 82	F	M	A	M	J	Jl
Orientation													
Start-Up													
Inservice			A,E PD	MC MA	CM CA								
Closure													

	Year 5 Impl./Dissemination/Diffusion										
	Ag	S	O	N	D	JAN 82	F	M	A	M	J
Orientation											
Start-Up											
Inservice											
Closure											

PROJECT PHASE

I - Start up and planning
II = Implementation/adaptation
III = Implementation/maintenance
IV = Dissemination/maintenance
V = Diffusion/maintenance

STAFF

A = Administration
PD = Program Design
MA = Materials Acquisition/Adaptation
MC = Materials Cataloguing/Advertising
CM = Circulating Materials
CA = Consultant Acquisition
E = Evaluation, revision

*Role groups might receive technical assistance in teams cutting across role groups.

gust, 1979. In September, 1979, the technical resources personnel receive instruction on Phase III of the project, implemention and maintenance. They gather resources and materials December, 1979, through April, 1980. In April, 1980, they begin to circulate instruction to project administrators in Phase III activities.

It should be remembered that a small staff may not be able to learn about, design, and circulate all the resources necessary to such an operation. Thus, researchers/evaluators, designers, acquisition/maintenance personnel, and circulation/presentation personnel may be needed in a given technical resources office. This prediction is based upon the fact that technical resource personnel are designing and acquiring inservice for program implementation strategies for Phase III of Program 78 administrators during the very time they are expected to be circulating orientation and start-up resources to Program 78 projects. While they are designing implementation strategies for Program 78, they are circulating technical resources on planning strategies for Program 78 projects and circulating already available technical resources on orientation and start-up Program 79 projects.

The type of activity specified down the far left column of the sample planning charts could be changed. For example, the categories of orientation, organizational development, start-up, inservice, and closure could be changed to administration, institutionalization, and educational personnel development programs. Several different types of forecasting charts can be made in order to understand when technical resources efforts would be most beneficial for specified tasks.

Forecasting at the Washington Office Level

Washington office staff should not be overlooked when planning and budgeting technical resources. The permanent and temporary (consultants and experts) personnel who make up the

Washington office should be eligible for new skill-acquisition training and for renewal/updating of skills required for ongoing tasks.

When various types of technical resources are needed, they can be partially predicted by: (a) studying the projected calendar of events in local and regional offices, and (b) studying the calendar of events in the Office of Education. Time-lines as they relate to projects and regional offices have previously been discussed. In addition, the Washington office must add to its time x task requirements the "givens" from the Office of Education. Some examples of these events might be deadlines for submitting programs, budgets, facilities, logistics, and evaluations.

Rules changes from the Office of Education, new emphases on directions in the program, new staff acquisition, staff mobility, temporary expert staff, and the political and social nature of any staff all suggest a need for technical resources delivery for Washington office personnel.

Table 10 suggests some time periods during which Washington office staff could most use technical resources in some sample areas. Technical resources personnel may want to use such a chart to identify specific role groups or teams of role groups that should receive specified technical assistance. They may want to consider issues which Teacher Corps will need to address when using any forecasting system to plan technical resources for central office personnel. The Task Force did not have enough information about operations in the Washington office to complete a sample chart meaningfully.

Summary

Careful consideration should be given to forecasting the times at which technical resources will be needed by various role groups at the local, central/regional, and Washington

TABLE 10
A Sample Group x Time x Task Planning Chart Used to Plan Technical Resources for the Washington Office

Tasks				Announce			Fund	Year 1 Planning												Year 2 Implementation											
	JAN 78	F	M	A	M	J	Jl	Ag	S	O	N	D	JAN 79	F	M	A	M	J	Jl	Ag	S	O	N	D	JAN 80	F	M	A	M	J	Jl
Budgeting																															
Program Design																															
Staffing																															
Logistics																															
Evaluation																															
Funding																															
Communications																															
Project Selection/Rec.																															
Etc.																															

								Year 3 Implementation												Year 4 Imp./Dissemination/Diffusion											
								Ag	S	O	N	D	JAN 81	F	M	A	M	J	Jl	Ag	S	O	N	D	JAN 82	F	M	A	M	J	Jl
Budgeting																															
Program Design																															
Staffing																															
Logistics																															
Evaluation																															
Funding																															
Communications																															
Project Selection																															
Etc.																															

								Year 5 Impl./Dissemination/Diffusion																							
								Ac	S	O	N	D	JAN 83	F	M	A	M	J													
Budgeting																															
Program Design																															
Staffing																															
Logistics																															
Evaluation																															
Funding																															
Communications																															
Project Selection																															
Etc.																															

Personnel:

Administration
Program
Evaluation
Logistics
Etc.

offices. The time requirements for technical resources among these three levels are interdependent. Without such a master plan analysis of needs at all levels, equitable allocation of resources will not be possible.

AN ORGANIZATIONAL FRAMEWORK IN TECHNICAL RESOURCES DELIVERY

Several different models for organizing a national effort in delivering technical resources were considered by the Task Force. Of the models generated, one in particular seemed to be the most completely conceptualized. It was selected by the group to be recommended as one they would like the Washington office to consider further. This section will present the various facets of the recommended model, discussing the following areas; general principles of the model, the organizational structure of technical resources allocation, the budgeting strategy for the model, and the possible types of centers within the structure. Other models designed by Task Force members have been included in the appendices to provide Teacher Corps with alternative models generated by members.

The Task Force realizes that, in the time available for them to work and plan together, it was not possible to consider all the benefits and constraints such a model would pose for Teacher Corps. A benefits and constraints analysis should thus be performed by Teacher Corps, should they find the model worthy of pursuit.

General Principles

There are several general principles associated with the recommended model, as follows:

1. A training program for program specialists should be started.
2. Program specialists should have prime communication responsibility for dealing with local projects. Other national and regional personnel should have a staff (advisory) relationship.

3. Training programs for all key personnel should be ongoing and involve all newly appointed personnel through a continuing training mechanism (e.g., self-instructional materials).
4. The function of geographic groupings should be limited to: a) communication and sharing among project directors, and b) the pooling of requests for technical resource help (as distinguished from building the internal capacity for providing such help).
5. There should be general-purpose regional resource centers which build and supply technical resource delivery (RFP).
6. A generalized administrative and management technical resource capacity should be developed (RFP).
7. Technical resource assistance during the first year should be focused on the development of demonstrable elements (DE's): a) central to the Teacher Corps mission, b) relative to all project components (LEA, IHE, community), c) specific enough to be evaluated precisely with established criteria for success and/or failure, and d) with the potential to be institutionalized and disseminated. These elements will come from the initial proposal, with modification, addition, and deletion as a result of the planning year's activities.
8. Each project will be asked to identify four to ten DE's which are thoroughly discussed and ratified by the majority of members of each project constituency. These DE's will represent priority areas where the project would like technical resources.
9. Each project will identify a single DE for which priority technical resources are requested.
10. Teacher Corps/Washington will collate all local DE's (300-800 in number) and perform a factor grouping to identify a smaller number (perhaps 50) which represents truly different elements.
11. Teacher Corps/Washington will select five to ten DE's to be national priority elements for which a generalized technical resource capacity will be developed (RFP).
12. These DE's will become the focus for technical resource activities. It is recommended that 75 per cent of all technical resource funds be allocated to provide assistance to DE activity.
13. The amount of funding available for technical resources should be allocated based on a priority system of Technical Resource Units (TRU's). It is suggested that the value of each TRU be developed by dividing the number of units into the available funds. DE's identified as

national or local priority would be weighted "5." DE's identified as ordinary priority would be weighted "1." TRU's would then be calculated as follows:

Local Priority DE's X the number of projects X 5 =
Nat'l Priority DE's X the number of projects for each X 5 =
Other DE's X the number of projects for each X 1 =
Total TRU =

14. The allocation of TRU's funds would be divided among direct consultants, regional resources, and DE priority centers. But all TRU funds would be required to be charged to one or more specific DE's.

The Organizational Structure

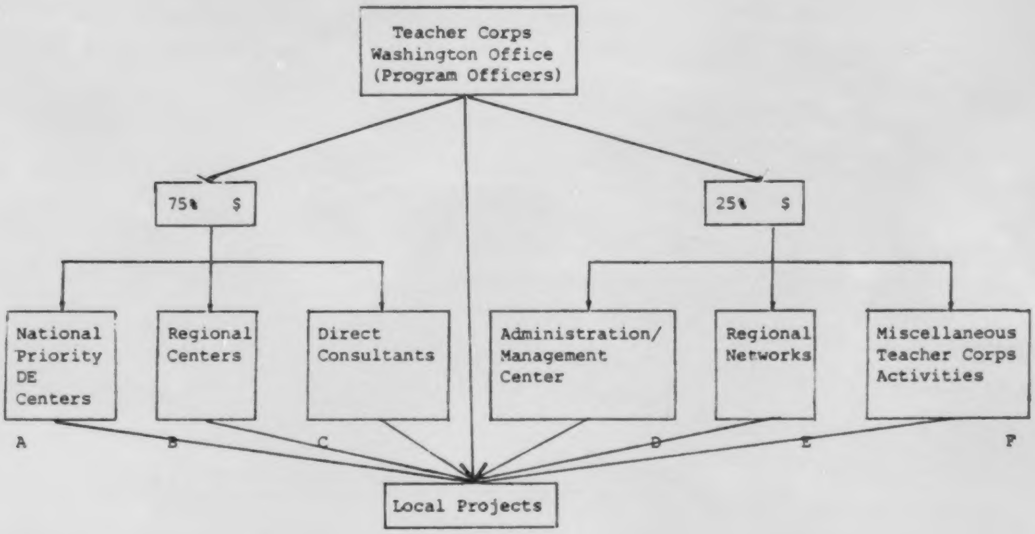
The recommended structure of the technical resources delivery system is shown in Figure 3. In that structure, the Teacher Corps/Washington office communicates directly with local projects through the program specialists during the identification and prioritization of demonstrable elements (DE's) in the local projects. These activities are ongoing during the planning year. Once DE's are selected by local projects, they are sent to the Washington office and prioritized in a manner chosen by that office.

At this point, three different mechanisms for responding to DE's are established. Two of the mechanisms are technical resource centers, called National Priority DE Centers and the Regional Centers (designated A and B, respectively, in Figure 3). This structure also includes a mechanism for directly hiring expert consultants to address established DE's in local projects or regional groupings of projects. These three mechanisms are established to respond to identified and prioritized DE's, and should receive 75 per cent of the technical resource budget.

The other 25 per cent of the technical resource budget should be reserved for an Administrative/Management Center, Regional Networks, and Miscellaneous Teacher Corps Activities (designated D, E, and F in Figure 3). The Administrative/Management Center is a central organization to coordinate,

FIGURE 3

The Organizational Structure Suggested for Technical Resources Delivery



Teacher Corps Washington Office (Program Officers)
75% $
25% $
National Priority DE Centers
Regional Centers
Direct Consultants
Administration/ Management Center
Regional Networks
Miscellaneous Teacher Corps Activities
A
B
C
D
E
F
Local Projects

plan, and manage all technical resource activities. It should also serve as an information and resource bank, and provide information and assistance to other centers and/or projects seeking a special type of assistance.

Regional Networks are not to serve a training function, but would offer a communication, administration, and facilitation function within a geographic region.

Miscellaneous Teacher Corps Activities is the third category of the 25 per cent budget allocation. This category is recommended to keep abreast of new developments, new directions, and unforeseen circumstances. It should be managed by the Washington office.

The Budgeting Strategy for the Model

An example of how resources can be equitably budgeted to fit the model should be presented. The Technical Resource Unit (TRU) system is weighted to provide the most technical resources to priority DE's. The value of each TRU is developed by dividing the number of units into the available technical resource funds. DE's selected as national or local priorities are weighted "5." Regular DE's are weighted "1."

The example that follows is based upon 80 local projects. Assume that the total DE's selected by the 80 projects is 592. Of these 592, 80 are selected as priorities (one for each of the 80 projects). The 592 DE's are sent to the Washington Teacher Corps office, analyzed, factored, and reduced to 60 unique DE's. From these 60 unique DE's, the Washington office will select five or six representing highest priorities. Upon comparing the five priority DE's from the Washington office with local project priority DE's, it is discovered that the following numbers of projects have selected each Washington priority:

67
42
31
26
19
285 Total number of local projects that selected a priority DE of the Washington office.

According to the previously discussed weighting system, TRU's would be allocated as follows:

1. Local priority DE's 80 X "5" (weighting) = 400 TRU's
2. National priority DE's 185 X "5" = 925 TRU's
3. Common DE's 592 (total)
   - 80 (local project priority
   - 185 (Washington office priority) = 327 TRU's

1,652 Total TRU's.

Based upon this example, approximately five million dollars are available for technical resources. If 75 per cent of the technical resources are ear-marked for DE's, the proportion of the $5,000,000 designated for DE's is $3,750,000. Each TRU then becomes worth approximately $2,250. Using this figure:

1. Local projects get 400 TRU's for their priorities; 400 x $2,250 = $900,000.
2. Washington priorities get 925 TRU's; 925 x $2,250 = $2,081,250.

3. Common DE's are allocated 327 TRU's; 327 x $2,250 = $735,750.

Using such a formula to allocate available funds, the proportion of funding would be appropriate for priority DE's regardless of the total amount of funds available for all technical resource activities each year.

Concerns about the Proposed Model

Because of the time available to work, the Task Force did not have time to identify and consider all the implications of the proposed model. As a result, the group listed concerns and cautions that its members believe are important. These include:

1. Projects often shift their interests and emphases. These shifts are sometimes positive and based upon increased awareness of local conditions and personnel capabilities. The selection of DE's early in the project might cause a project's focus to become overly rigid.
2. How much will this new system cost? Will effectively developing these centers cost more than is financially available to develop and maintain them?
3. If technical resource centers evolve out of DE's selected during the planning year, then technical resource centers cannot be planned and developed until the following year. This poses a problem: projects will need some technical resources during the first planning year. One or two centers can be developed to cover start-up and planning activities.

The Task Force recognizes that the end of the planning year is too late to identify DE's that relate to orientation, start-up activities (such as organizational development, institutionalization, evaluation, documentation designs), and program development. As a result of this difficulty, the group recommends that some technical resource centers be identified immediately and become operational by the spring of 1978, when project administration teams and program specialists will need orientation and start-up activities. Other centers can be named through the DE priority selection process and be operational by the summer of 1979.

The identification of the technical resource centers which should be established immediately is not difficult. Priority areas (as identified through task, role group, and time analysis) are as follows:

3.1. Start-up activities. These include organizational development; collaboration processes; institutionalization processes; and management techniques such as recruitment, selection, and monitoring of personnel, and budget allocation. Some or all of these content areas are meant for both the project administrative team and the administrators of collaborating institutions.

3.2. Program planning, development, documentation, and evaluation. This center would provide for skills in needs assessment, selecting goal priorities (the identification of DE's), program location and adaptation or development to suit priorities, and field testing programs and revising activities and procedures to be most effective at a given site. The evaluation stressed in this center is formative evaluation, or that recommended for program development activities. Impact evaluation would be of little use during the design phases of a project. An evaluation at this point should be done to identify, develop, and improve program operations.

The first center recommended would facilitate the development of skills, attitudes, and procedures necessary to institutionalize successful Teacher Corps components. Institutionalization does not begin at the end of a project; rather, it begins at the project's outset. Institutionalization and collaboration are both primary goals of Teacher Corps.

The second center, devoted to program planning, development, documentation and evaluation, will provide the skills and attitudes necessary for personnel to design programs that can be demonstrated. During the planning phases of a project, it is important for these activities to be presented together as integrated procedures. Design and planning, thus, should not be presented separately from documentation or evaluation. All such components are necessary parts of an integrated process, and should be treated as such in the technical resource center.

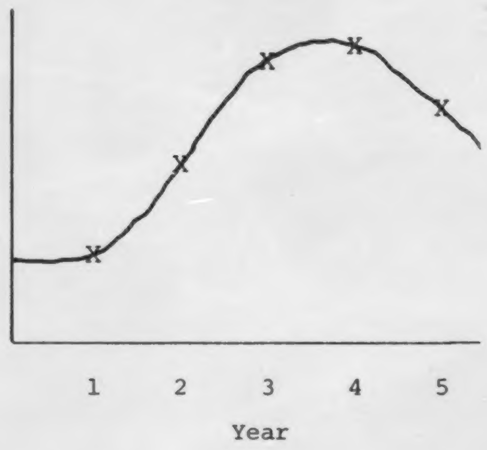
These two centers should be adopted as priorities by the Washington office, and should be operational by the summer of 1978. Other priority centers can be identified through the priority DE process and be operational by the summer of 1979.

4. Technical resource centers should be funded on the basis of RFP's.
5. It may be possible to predetermine the size and location of the technical resource centers to be started at the end of the planning year, and then to determine the content focus through an analysis of DE's.
6. It may be necessary during the first year to switch the 75 per cent funding from the priority DE's side to the administration side. After projects have identified their DE's and the Washington office has selected priority DE's, then the 75 per cent funding would shift to funding the priority DE's and the 25 per cent would shift back to the administration and management side (see Figure 3).
7. An RFP for the administrative/management center should be published immediately, and the center should be operational by June, 1978. This center should be available by the time the Program 78 project directors are selected.
8. Funding for priority DE's would be light during the first and fifth years of the project; the proposed funding curve is included in Figure 4. As illustrated, funding for priority DE centers would be light during the first year, when projects are selecting DE's, and during the last year, when most technical resources will have been delivered.
9. The governance of the technical resource centers is an important consideration. Ineffective governance will strangle the potential of the centers. Each center should have its own advisory board, which includes center personnel, relevant members from local projects, topic experts, evaluation specialists involved in local and national studies related to the center's topic, and a relevant program specialist from the Washington office. Together, this group can analyze the status of Teacher Corps personnel in target areas, select directions and priorities for technical resource activity, and design and interpret the effectiveness of impact studies related to the technical resource efforts.

Impact evaluation of resource efforts for a given center should be conducted by a group external to that center. The

FIGURE 4

The Proposed Funding Curve
for Priority DE Centers



advisory board can help the external evaluation group plan the study and can interpret and generalize findings from the studies.

Other models for conceptualizing technical resources organization are included as Appendices H and I. Those interested in alternatives to the model proposed here should consult those appendices.

The Technical Resource Center

A center should resemble an instructional assessment, training development/adaptation, and diffusion laboratory, which has a permanent administration, planning, design, and evaluation team. This team would consist of needs assessment/updating experts; experts in materials location, procurement, and adaptation; experts in materials development and technicians capable of producing print and nonprint materials; experts in planning and managing hands-on simulation workshops; topic content experts who work on a consulting basis; and experts in logistics and support of large and small temporary training sessions. In addition, a team may consist of a "hot line" materials locator/provider expert.

TABLE 11

Tasks That Will Need to Be Performed in a Technical Resources Center

Personnel Administration	Program Management/ Budget	Logistical Support Services	Information, Materials Storage/Retrieval
Recruitment	Needs assessment	Procurement	Taxonomy
Selection	Forecasting	Installation	Library Service
Training	Evaluation of materials/procedures	Maintenance	Selecting/purchasing
Transportation	Program planning/ development	Repair	Cataloging
Housing/feeding	Budget estimates	Equipment/facilities arrangement	Classifying
Reproduction/ duplication	Cost evaluation	Services (custodial, secretarial, etc.)	Storage
Materials	Performance reports	Space procurement, allocation	Circulation
Evaluation of personnel	Research		
	Follow-up evaluation		

Table 11 lists come hypothetical functions and tasks that might be performed in a technical resources center. The identified tasks fall into four major categories: personnel administration and communication, program management and budget, logistical support services, and information and materials storage, retrieval, and circulation. There are many specific tasks to be performed within each of these broad categories. The major message from this job analysis form is this: one or two persons will not be able to effectively plan and manage a technical resource center for a large number of role groups and activities.

Clear lines of authority and/or responsibility should be established among local projects, technical resource centers, and the Washington office relative to technical resources planning and delivery. Without a clear understanding of responsibilities, people and centers will define their own functions; those functions may or may not be compatible with planned missions. A clear understanding of tasks and responsibilities for each office will help avoid duplication of efforts, materials, and training.

Communication of events and activities within a center and across centers will also help curb duplication of effort. A good, updated information management system will be essential to the effective operation of a large, national technical resources effort.

Summary

Adequate planning and analysis will be necessary before an effective organizational structure for technical resources is identified and operational. In addition to the overall relationship among Teacher Corps projects, technical resource centers, and the Washington office, the exact mission and duties of each established center will need to be planned, clarified, and communicated among all Teacher Corps constitutents. With Project 78 awards rapidly approaching, it is now time to begin selecting among alternative strategies/models for the organizational structure of technical resource centers.

CONSIDERATIONS RELATED TO WHICH ORGANIZATIONS CAN MOST EFFECTIVELY DELIVER TECHNICAL RESOURCES

There are many factors to consider when planning the type of organization that can best deliver technical resources for a particular role group in a particular location. Could national, regional, or local technical resources center/consultants (or combinations of these configurations) best perform the task? The Task Force discussed several ideas related to that question. These include the current between-level or interactive delivery of technical resources and criteria that can be used to help make decisions about preferred organizations to deliver given technical resources.

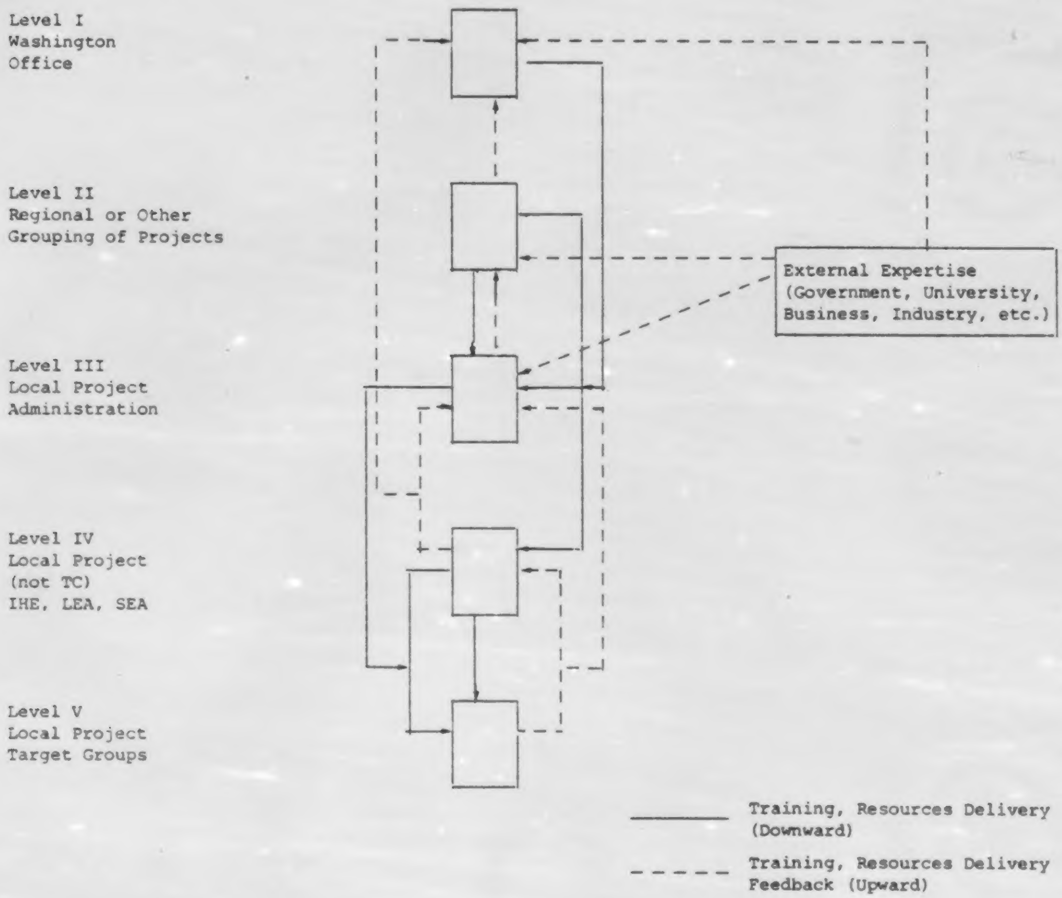
Interactive Delivery of Technical Resources

One way of conceptualizing a model for deciding who should deliver technical resources is to consider the training needs at the five Teacher Corps programmatic levels, from the Washington office to the site school. In the past, delivery of technical resources has been in a multi-level mode; each level has delivered technical resources within its own level, and to all other levels downward. For example, regional offices provide technical resources to other regional office personnel, to local project administration and staff, to LEA, IHE, SEA personnel, and occasionally to classroom teachers and interns. University faculty at Level IV often provide technical resources for personnel at Levels III, II, and I.

Figure 5 illustrates the five programmatic levels. The solid lines downward represent the planning and delivery of

FIGURE 5

An Example of the Interactive Routes for Technical Resources Delivery


Level I
Washington
Office
Level II
Regional or Other
Grouping of Projects
Level III
Local Project
Administration
Level IV
Local Project
(not TC)
IHE, LEA, SEA
Level V
Local Project
Target Groups
External Expertise
(Government, University,
Business, Industry, etc.)
Training, Resources Delivery
(Downward)
Training, Resources Delivery
Feedback (Upward)

technical resources from the national to the local levels. Generally, the Washington office has planned and arranged technical resources for personnel at Levels I, II, III, IV, and V.

In addition to the downward direction of technical resources delivery, there is also an upward direction of Teacher Corps technical resources. Thus, teachers and interns (Level V) provide input and planning for college faculty and deans (Level IV). Deans, IHE faculty, and LEA administrators (Level IV) provide know-how and planning for local project administration (Level III). Deans, IHE and LEA faculty (Level IV), and project administration (Level III) provide planning and know-how for regional offices (Level II) and the Washington office (Level I). The upward direction of information and expertise is generated from experience gained in trying to apply proven research findings in real school settings. Current information about what works and what does not work is important for program planning, monitoring, and adjusting at all five levels.

Another model of technical resources delivery would be to provide technical resources in information, socialization, and orientation using an open upward/downward delivery model. That would also involve providing hard, hands-on skill training in a more closed model in which meeting counterparts from other regions, projects, or levels may not be as important as working in a project team that includes cooperating role groups.

Considerations about the generalizability or specificity of certain needs across levels could help conceptualize a delivery model that suited particular tasks. For example, all members of the project administration team should receive training in planning, implementing, evaluating, disseminating, and diffusing. These skills would be taught to all project administrators, in all regions, at all levels (III, II, and I). The recommended technical resource centers can provide skills in such multi-level, multi-role group skills.

Criteria by Which to Select among Delivery Organizations

There are no doubt some criteria that can be applied to helping Teacher Corps select models of technical resources delivery that most suit its needs. Some criteria include the numbers of persons to be trained in a particular set of tasks; the time available to meet personnel training needs; the costs involved in a large, national training effort; the direct and indirect goals of a training effort; the availability of portable training materials; the nature of the training; and the location of persons.

The number of persons to be trained is an important consideration when determining who should provide training. If 2,800 to 3,000 classroom teachers were to be trained in teaching methodology requiring longitudinal presentation and follow-up, such training would most likely occur at the local site. The expense and organizational effort required to move 3,000 classroom teachers to a regional or central location for simulations and follow-up would far outweigh the expense of providing the instruction locally within sites. However, since there is only one dean per site, training provided for such personnel on-site would tend to be tutor-type or one-to-one training, which is extremely expensive. It would therefore probably be most cost-effective to group deans for training, either regionally or nationally. They could, however, be efficiently trained with administrators from other collaborating groups on-site. In a year there would only be 40 to 80 deans in a project-year grouping.

The time available to train personnel is another important consideration. If 240 interns need to receive orientation training within a two-week period (between their selection for the project and the beginning of their duties at the site school), a regional or national workshop may be the best solution. Another common time problem is represented by the critical training needed by project directors during the time between funding and project start-up. Since there is not enough time and expert training staff to provide local or regional training, a national grouping of all new project directors (perhaps in the CMTI mode) would no doubt be a good solution.

The costs involved in large-scale training effort represent another consideration. When comparing the costs of providing training regionally and nationally, it is important to consider the costs of not training personnel, permitting them to work without the proper orientation, socialization, or skills.

Direct and indirect goals are an important issue in determining where training should be provided. The advertised purpose of a conference or workshop on community involvement may be to provide real skills in advertising programs and enlisting community aid. However, an unadvertised goal may be to provide personnel with the opportunity to work with others in similar role groups, or in cross-role group teams that have similar programs and problems. During formal and informal conversations in national and regional groupings, such personnel can learn together and share experiences. A self-instructional package and newsletters on community involvement will not provide the opportunity for those working in community programs to meet and discuss successes and problems. Time spent together, then, is important.

The availability of good, portable instructional materials may help to determine whether instruction can effectively be done nationally, regionally, or locally. Effective materials that are inexpensive enough to distribute nationally and then used in local training activities may help determine whether some types of training can be done across the nation at local sites. If directors, evaluators, and PDS personnel were trained regionally or nationally in the use of certain techniques and materials, they could in turn use those materials to train personnel at their home sites.

The level of skill acquisition desired can also help determine where training should take place. If personnel are to learn "about" something, a lecture or short workshop on a national or regional level may be most desirable. However, if they are required to study a process over a long period of time and to apply skills in a variety of settings, a longitudinal seminar or course-type mode of instruction may be most effective. This type of learning would have to be done at local sites because of the time required for continuous observation and feedback on learners' progress.

The location of role groups to be trained will help determine who should provide instruction. For example, if all those to be trained are from the southeast, then training should no doubt occur in the southeast.

Summary

Decisions related to choosing an organizational structure to best provide instruction for personnel at different levels are complex. A variety of factors and criteria must be considered each time technical resources are planned and delivered. The delivery mechanisms that have worked best in the past may not work effectively under the new rules and regulations. It is necessary to develop technical resource centers that can become expert in an area of skills and then to have that organization provide development, research, evaluation, and training in that particular content to local, regional, and national levels of personnel.

METHODS FOR DELIVERING TECHNICAL RESOURCES

Determining methods for delivering technical resources before identifying the content and purpose of the resources is an exercise in abstraction. However, some general guidelines and considerations which were discussed by the Task Force should be presented. This section will therefore discuss the need for collecting, cataloging, and circulating available materials; some strategies for advertising and delivering available resources; and possible resources that could be made available.

Collecting Available Resources

A primary recommendation of the Task Force is that formal methods should be implemented to determine what resources are already available at each level. In addition, other activities must be undertaken to build and strengthen technical resource efforts; these include collecting available resources, obtaining needed resources not available, and advertising resources so they can be circulated to those who need them. The Administration/Management Center illustrated in Figure 3 could provide these services on a national level.

It does not appear that effective organized efforts have been undertaken by the Teacher Corps to identify, procure, maintain, and circulate resources on a local, regional, or national level in the past. It was noted that a few projects and a small number of regional offices have done a commendable job in maintaining and sharing resources. However, the Task Force believes it is important to expand and formalize these efforts, and to make resources available to all personnel who need them at all levels. This will not happen unless an organization is made directly responsible for these services.

Advertising and Delivering Technical Resources

There are several suggestions members of the Task Force would like to make concerning the advertisement and delivery of technical resources. They include:

1. Develop a taxonomy and scheme for classifying tasks by content, goal, and need.
2. Use the agree-upon taxonomy and classification schemes for local projects a) to identify materials and workshops they develop or use that are effective locally, and b) to inform regional offices of the availability of such materials.
3. Keep all materials identified under agreed-upon classification schemes for easy location and delivery.
4. Publish a "shopping list" of materials, workshops, etc., which are available centrally, and make the list available to regional offices and local projects. Projects can use this shopping list to identify and check help they need and want.
5. Have materials/resources displays available for participants at national conferences and/or workshops, and at regional conferences and/or workshops.
6. Inform project/program directors of available resources (including new acquisitions) in announcements at conferences and in conference programs and bulletins.
7. Provide sample exemplary products from current and past projects to provide a standard by which other projects can judge their current performance in order to decide whether they need (and should seek) technical resources.
8. Identify a resources person in each project, grouping of projects, and the Washington office to become aware of in-house resources, to answer questions concerning what is locally available, and to maintain an up-to-date knowledge about what is available locally, regionally, and nationally in high interest areas. This person should communicate frequently with personnel in the Administrative/ Management Center to determine what is available to the project and to provide the center with products and materials from the project.

Without collecting resources and formalizing the advertising of available materials and workshops, efforts will not be efficient. There will be continuous overlapping of efforts and materials. There will be enough to do in Program 78 without duplicating training efforts (unless that is the planned strategy) across projects, technical resource centers, and national training conferences and workshops.

The Task Force generated a list of possible resources that could be made available to personnel at the local, regional, and national levels. Decisions and recommendations in choosing among these are academic at this time, since a particular type of training for a particular role group in a particular setting is not firmly in mind. However, the list is included in Appendix K for those who may be interested.

Again, the Task Force realizes that a discussion of particular delivery methods is academic without first deciding what is to be delivered to whom and where. The possibilities discussed by the group during simulations are also included in Appendix K.

Summary

The possible methods of delivering technical resources are limitless. When the Task Force ran out of single methods, its members started combining methods to form permutations of the original list. It appears that delivery methods can only be limited by the imaginations of those assigned to select them --or, perhaps, by funds available to secure or develop them.

CASE STUDIES AND TRIAL RUNS

In order to validate some of the suggestions made on purely academic grounds by the Task Force, several specific needs were hypothesized by members. The members then made decisions about who should provide related activities to whom, where, how, and when. Case studies were developed by several Task Force members. Appendix L includes a case study developed by J. T. Sandefur to illustrate the analysis of technical resources required to develop collaborate governance at the university level. Categories included in that analysis are the problem area, possible types of technical assistance that will be needed, audiences to receive assistance, the level (local, regional, national) that could most effectively deliver the assistance, and points at which the assistance will most likely be needed. Appendix L also includes a second example analysis of the development of an effective, functioning community advisory council produced by Tony Carillo. The same categories of analysis were used in that analysis.

Many different case studies were developed by team members. Jimmie Marie Thomas selected three DE's from a project (developing a positive school advocacy group, developing the interns' program, and developing an inservice staff development program) to use in a case study. She was able to successfully analyze the DE's using the same system used by Carillo and Sandefur in their analyses. Jim Anderson carefully analyzed technical role groups to illustrate that it can be done in a logical, systematic manner.

The work completed by Task Force members illustrates that careful analysis and forecasting of technical resources can be accomplished in a concrete manner when one analyzes a real need for a real target group. Though the work completed by the Task Force often bordered on the abstract and the academic, when real needs were analyzed using the system, the group was pleased with the level of results.

EVALUATION

The evaluation planning necessary to obtain and maintain an effective technical resources delivery system is a very important issue. Based upon evaluations, local projects assess their ability to deliver needed resources to the IHE, LEA, and SEA; they also make programmatic changes and decisions based upon evaluation findings. Likewise, technical resource centers and the Washington office must evaluate their efforts in providing technical resources to all designed Teacher Corps programs.

Within the national, regional, and local levels, evaluation efforts should cover many different facets of the program. These include the effectiveness of personnel, the materials and equipment used, the facilities used, and the impact of resources upon target groups. A further elaboration of the types of variables that can be assessed at each level is included in Table 12.

Many different types of evaluation techniques will be required to monitor all the types of technical resources designated for all role groups. Table 13 includes options for planning evaluation activities.

Evaluation efforts must be planned in advance so that information gained through monitoring at all levels is important, compatible, computable, can be synthesized, and can be used to guide and assess technical resources programs at each level.

TABLE 12

Evaluation Considerations for Assessing Technical Resources Efforts at the National, Regional, and Local Levels

	Personnel																Materials/Equipment											Facilities								Target Groups							
	Adm.						Develop					Deliver																															
	Planning	Recruiting	Staff Management	Evaluation	Logistics	Etc.	Timely	Quality	Portability	Reusability	Cost	Timely	Right Group	Format	Motivation	Cost Effective	Learning Efficient	Attractive	Motivational	Reusable	Durability	Accessible	Cost Effective					Size	Realistic to Purpose	Location	Cost Effective	Conducive to Learning				Performance	Attitude	Behavior					
Washington Office																																											
Regional Center																																											
Local Projects																																											

TABLE 13

Monitoring Technical Resources Efforts

Level	When	Who Assessed	How Assessed	Suggestions
National Regional Local	Assessment planning/ development Pretraining During training End of Training On-the-job	Administrators of technical resources Developers of technical resources Implementers of technical resources Target groups for technical resources Audiences of target groups for technical resources (i.e., pupils of classroom teachers, interns)	Observation Audit Inspection Rating scales Surveys Diagnostic Attitude Expectational Texts (performance) Paper/pencil Products On-the-job Anthropological descriptions	Advance planning Focus on objectives verifiable relicable Cooperative Continuous Specific-pinpoint strengths/ weaknesses Quantitative Qualitative Result in usable information

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APPENDIX A

Needs Identification and Priorities Generated by Teacher Corps Personnel in the Research Adaptation Cluster

Research Adaptation Network Conference

Chicago Pick-Congress

October 26 & 27, 1977

THE PLANNING PROCESS AND PLANNING IN YEAR ONE OF THE 78 TEACHER CORPS PROGRAM

Wednesday afternoon Questions and Responses by seven working groups

Question #1: What is the single most important objective to achieve during the planning of the five year program?

Responses:

Group 1 Getting consensus and commitment of energy and time from the Dean, Superintendent, and community person.

Group 2 Collaborative reaffirmation, rededication, and refinement of future promises contained within the original proposal:

(a) development of commitment to collaboration
(b) development of a plan for collaboration
(c) development of ways to bring new members into collaboration --all for the purpose of collaboratively developing a plan for the last four years.

Group 3 To negotiate a viable plan for the balance of the project.

Group 4 How do you achieve the trust and involvement of participants? Ownership?

Group 5 Redeveloping and refining the objectives, activities, and resources required for the next four years.

Group 6 Develop an analysis of the client systems, including organizational structure, cultural environment, history of change (including perceived needs of role gorups), etc., that can help determine major program objectives and methods of service delivery.

Group 7 Legitimizing the need or problem to the prospective participants.

Question #2: What will be the most difficult obstacle(s) to overcome during the planning year?

Responses:

Group 1	Getting an effective, working, elected community council.
Group 2	Making collaborative process function.
Group 3	Unpredicted changes in project environment and personnel.
Group 4	Individual's and organization's agendas-power relationships? Communication?
Group 5	How to establish and maintain a power base while getting people to actively work on a non-existent program and maintain momentum.
Group 6	Involvement procedures for getting everyone involved systematically over a long period of time in the planning process. Director role confusion in year one. Is he/she agent, client, facilitator or dictator?
Group 7	Clarifying the problem.

Question #3: What will be the most difficult obstacle to overcome in planning with respect to:

I School environment objectives
II Educational personnel development system objectives
III Institutionalization objectives
IV Demonstration and dissemination objectives
V Collaborative governance
VI Community involvement program
VII Documentation and evaluation

Responses:

Group 1	School environment objectives: awareness of Teacher Corps objectives and concepts--incentives--overcoming resistance.
Group 2	How do you overcome differing perceptions from various role groups of research adaptation as it applies to demonstration in I-VII?

Group 3 Fear--ignorance--apathy--inertia

Group 4 (Part IV) Developing strategies for getting people to be willing to demonstrate; adaptation versus adoption; what are the communication networks and who is going to do it.

Group 5 (Part V) Collaborative governance--How to make the transition from Cycle II (staff) to a temporary (3 month+) system to another permanent base--which may not be the same people?

Group 6 (Part VI) Community Involvement--Help. Confusion in roles. Conflict between school board, principal, advisory powers, decision powers when policy of state, school and/or Teacher Corps disagree!

Group 7 In regard to evaluation: selling the evaluation notion to participants.

Question #4: What other concerns about year one planning do you have that were not expressed in items 1 - 3?

Responses:

Group 1 Developing credibility of IHE faculty on-site. Getting IHE faculty and staff to show up regularly on-site.

Group 2 (a) How do you buy colleague time for project needs; beyond that, how do you get them to reprioritize their time once you manage to buy them? (b) How do you deal with the university "transience phenomenon" ? i.e.: Why should an IHE person invest heavily in a short-lived federal project?

Group 3 Maintenance of organizational health.

Group 4 How do you keep enthusiam (payoffs) maintained? i.e.: If after planning, the project fails, was there still some payoff for the participant? Pert--Charting the second and subsequent years?

Group 5 What is the role of the planning director? Is he/she or should he/she be temporary or permanent? task or interpersonal oriented? planner or implementation-innovator?

MAJOR CONCERN AREAS

Summary

1. Getting energy/commitment of the Dean and the Superintendent
2. Collaboration/trust/involvement
3. Incentives/momentum/enthusiasm
4. Roles - Planning Director and other staff
5. Community Council
6. Client Systems - analysis and management
7. Assumptions - What is already done

Thursday Planning Sub-group

Task: Describe the major activities that need to take place in a planning year one of a five year Teacher Corps Program

Scenario and assumptions about the five year program which will be the object of year one planning:

1. Elementary/Junior High/Senior High feeder school system in the same school community
2. Serves low income children
3. Urban area - medium size
4. There is a school community with defined boundaries
5. Four major objectives
    - a. Improve school environment
        - Education that is multicultural
        - Education for wide-range of variability
        - Diagnostic prescriptive learning
    - b. Develop an educational personnnel development system
    - c. Institutionalization
    - d. Dissemination
6. The district wants to develop a new kind of middle school - (there will be a transition from junior high to middle school during the five years)
7. The University wants to support three untenured faculty with the program (implications for retraining)
8. Secondary faculty in schools not very cooperative. Has a general mistrust for University professors with reason
9. Not much flexibility in time for training--strong teachers organization with contract watchers
10. School district wants to raise their students' scores on achievement tests and on practical skills tests

What the Thursday Participants Said They Wanted Out of the Thursday Session

1. Dialogue on issues related to the "78 program"
2. A Global view (of the "78 program")
3. Hear what people are saying about the planning year
4. Issues and slogans on planning
5. Possible pitfalls in planning and in the regulations
6. Share problems and look at what I'm doing
7. #2 and #3 above
8. Anything I can use

What Participants Agreed To Do In The Thursday Session

Describe major activities that need to take place in year one planning of the "78 program"

Notes from the Thursday Brainstorming Session

Functions that need to be carried out during the Planning Year of the 78 Teacher Corps Program

1. Develop a set schedule for meeting of the Policy Board and a program task force

    a. Policy Board meets once/month for 11 months (July - May)
    b. Obtain released time for task force
    c. Program task force composition (minimum)

        4 university persons
        3 principals
        3 teachers
        1 teacher organization representative
        1 school administrator (central office)
        3 community persons

    d. Functions of the program task force

        * develop and agree on master program design
        * coordinate all program development and operations
        * develop criteria for programs and personnel
        * recruit and select corpsmembers
        * develop process for recruiting and selecting staff personnel
        * establish and communicate legal rights and responsibilities

2. Possible university activities for year one

    a. Communication to university community - reaffirm objectives
    b. Plan new masters' degree program
    c. Plan and develop new delivery system for inservice training
    d. Secure personnel to participate
    e. Plan new certification requirements
    f. Provide credit for teachers in developmental efforts
    g. Plan workshops and minicourses

        - basic skills - practical
        - diagnostic - prescriptive
        - multicultural education

    h. Get visible in schools - establish helping relationships

3. Possible school activities for year one

   a. Orientation and communication about Teacher Corps
   b. Sell the program - get ownership among teachers and administrators
   c. Reaffirm objectives - needs assessment revised early in the year
   d. Interaction between school and university personnel in schools
   e. Examine shool program schedule - plan "new school program"
   f. Involve community in objectives and needs assessment
   g. Plan staff development activities of central office staff
   h. Train and develop key group in schools (need to develop a core group in year one that has credibility)
   i. Plan intern program in the schools

4. Possible community acitvities for year one

   a. Define the school community
   b. Arrange for (logistics-promote-education, etc.) and hold an election for the community council
   c. Training community council for involvement and participation
   d. Revise, reaffirm, modify, project objectives of the community council (needs assessment update if necessary)
   e. Criteria for employment of community personnel
   f. Set up a two-way communication network between community council and the community at large
   g. Lay ground work for intern work in the community
   h. Resource identification and hook up in the community
   i. Role definition for community coordinator(s)
   j. Policy and procedures for community council
   k. Communicate and educate community about the five year program and the role of the community in the five year program

5. Primary emphasis for year one

   A primary emphasis for year one should be getting a core group together to be the "movers" of the program in years two and three in the university, the schools, and in the community. It was evident from the discussion that finding common meeting times will be a major problem.

6. General budget categories for year one

$12,000	Overhead (8%)
35,000	Administration
20,000	Community Council Activities
20,000	School Staff Activities
$35,000	University staff developer and planning activities
20,000	Discretionary for Planning
8,000	Travel

TOTAL $150,000

Appendix B

Tasks Specified for Role Groups As Identified in the Teacher Corps Rules

DEAN, IHE

Tasks Suggested in rules:

To obtain information concerning the purposes for and rules of Teacher Corps and to determine the compatibility of those purposes and rules with the long or short range goals of the college

To decide whether Teacher Corps funding would be appropriate for the college in light of TC's heavy emphasis on field-based inservice multicultural education, changes required in current inservice/preservice training modes, collaboration with local LEAs SEAs and communities, and institutionalization of successful practices and programs

To plan with the chairperson and faculty from the college's teacher education program concerning the college's capabilities needs and commitments in delivering field-based inservice training

To identify the college s role and responsibilities in entering a joint planning and delivery plan with the LEA and SEA for a long range project

To participate in collaborative planning with the LEA and SEA to identify resources, needs, and goals of each organization prior to initiating proposal activities

To appoint personnnel and resources to participate in proposal planning, research and writing

To appoint quality faculty from the teacher education program to participate in program planning and delivery in a field-based setting

To support, through the existing system faculty and departments who become successfully involved in the project

To become a participating member of the Policy Board which supervises planning and analysis of project activities

To facilitate communication of successful programs and procedures evolving from the project among various college departments

To plan methods and strategies for institutionalizing realized successes within the college and within the district

To facilitate the institutionalization of realized successes during and after the completion of the project

SEA Representative(s)

Tasks Suggested in rules:

To use state approval criteria to evaluate Teacher Corps proposals submitted by State LEAs and IHEs

To communicate state approval criteria to IHEs and LEAs interested in preparing a proposal for Teacher Corps including dates, timing procedures, content format, etc.

To collaborate with IHEs and LEAs concerning long range state goals for preservice education, teacher certification requirements, inservice education, and certification maintenance requirements.

To inform LEAs and IHEs concerning materials, projects and activities related to their target groups, and objectives that currently exist throughout the state whether funded through Teacher Corps or other organizations

To participate or facilitate the participation of representatives(s) from the SEA, in the project's Policy Board

To plan for and facilitate the institutionalization of successful outcomes from the project both during and at the conclusion of the project

To facilitate the communication within the state of successful outcomes from the project both during and at the conclusion of the project

LEA District Representative(s)

Tasks Suggested in rules:

To meet with representatives of the IHE and SEA to consider goals of the local district the compatibility of identified goals with those of IHE and SEA

To determine areas of common goals and resources for the LEA, IHE, and SEA and to identify areas where external funding (such as Teacher Corps) could most benefit the local district

To identify the goals and criteria of Teacher Corps and to determine the compatibility of those with long range district goals

To determine the role and responsibilities of the district in entering into a long term agreement with the IHE, SEA, and Teacher Corps

To assign personnel and resources from the district to collaborate with persons from the IHE and SEA for the purpose of planning, designing and writing the Teacher Corps proposal

To facilitate biographical research, needs assessment and evaluation ac tivities for target groups necessary in the site school, community and district

To facilitate preliminary planning for a proposal in the site school(s) with classroom teachers educational personnel and community members

To participate in negotiating the proposal with Teacher Corps Washington, the IHE and LEA and to adjust both district responsibilities and resources as needed

To facilitate communication about the project, its objectives and programs, to other organizations within the district prior to upstart during, and at the conclusion of the project

To make inservice instructional resources within the district available to participating IHE faculty, classroom teachers, teacher interns and educational personnel at the site school(s)

To become an active member of the Policy Board to monitor and adjust programs within the project to better meet district expectations

To plan and facilitate the institutionalization of successful programs and procedures which evolve from the project

Project Director and Administrative Staff

Tasks Suggested in rules:

To identify Teacher Corps goals and funding criteria

To determine district's/site's/IHE s eligibility for Teacher Corps funding according to each funding criterion

To establish and monitor collaborative planning among Policy Board members the Community Council, and personnel within the site school and district

To identify the roles and responsibilities of each group participating in collaborative planning, design and development efforts

To determine target groups to be affected through the proposed project and initiate assessment activities to identify current status on established goals (LEA, IHE, SEA, TC)

To collaborate with participating needs to establish priority objectives based upon discrepancy data available

To collaborate with IHE/LEA inservice/preservice personnel to identify available research-based programs, materials, and/or procedures available to address priority objectives for each target group

To coordinate the planning and development of the Teacher Corps proposal

To identify the scope of the proposal including personnel, resources and time

To identify the scope of the proposal including personnel, resources and time

To identify the type and number of staff required to implement the program and assign specified objectives to hypothetical staff members (skill x time)

To plan, prepare and analyze a budget to cover objectives and hypothetical staff, benefits, overhead, materials facilities and communication (intra and inter district)

To do initial planning with IHE, LEA, and SEA to determine: (a) personnel, resources, and facilities already existing within the district; (b) the best organization to provide specified personnel/services; (c) the personnel resources and facilities that should be obtained through Teacher Corps

To negotiate programs and budget with Teacher Corps and with the IHE, LEA, and SEA

To recruit, select and train personnel in accordance with skills and tasks identified for objectives and target groups

To initially establish: (a) the primary responsibilities, processes and products expected; (b) the secondary responsiblities and (c) and interaction patterns with other personnel (who will give them what and what they will give to whom) with each person hired

To plan interface among staff from the LEA, IHE, SEA and commuity

To design, implement and evaluate a documentation/information management system

Project Director and Administrative Staff

Tasks Suggested in rules:

To design, implement and evaluate an evaluation plan for each objective for each target group and staff group

To design and select or develop evaluation instruments to directly monitor target groups status on given objectives

To plan and implement an entry strategy to implant new Teacher Corps project staff into the existing site school staff and community

To plan project attitudes and activities within the school site to be sensitive to the rules and regulations established in the school/community

To become aware of leaders (positive and negative) within the site school, school district, IHE, SEA, and within the Teacher Corps staff and use this information in project monitoring and planning

To monitor program's implementation, process and impact and reward or plan for revision when necessary

To monitor impact the program is making on collaboration efforts of IHE, LEA, SEA, and community and reward/-revise as necessary

To plan and prepare interim reports for Teacher Corps Washington establishing the current status of objectives and target groups

To request and accept technical assistance for self and staff in troublesome or new areas

To monitor the effectiveness of staff members selected to perform certain tasks and reward, assist, or remove an individual when warranted

To operate as trouble shooter/problem solver for all groups within the project from the Policy Board to the teacher-interns

To motivate regular IHE and LEA teacher education faculty to become involved in the project and target groups

To monitor the program and select ideas, programs, and procedures that should be disseminated among other schools in the district teacher education faculty within the IHE and LEA and inservice personnel within the SEA

To monitor the program and select successful ideas programs, and procedures that should be diffused to other educational organizations for replication

To plan, develop and implement dissemination and diffusion activities

To plan and write a final report to Teacher Corps Washington and other invested groups

To plan and monitor the institutionalization plans and activities of the IHE, LEA, and SEA

Preservice/Inservice Instructional Staff (IHE/LEA)

Tasks Suggested in rules:

To collaborate with other instructional staff, project staff (evaluation and documentation specialists, teacher-intern team leader) and classroom teachers to coordinate planning, development, delivery, evaluation, and documentation of programs, successes and failures

To analyze the goals and objectives established in the contract with Teacher Corps Washington

To analyze the characteristics of the target group (age, time, interests, needs, etc.)

To prioritize and sequence the order of objectives according to which is most important, second most important, etc.

To identify and select instructional or other types of programs that will help target groups reach established goals

To obtain identified programs from IHE, LEA, SEA, Teacher Corps, etc.

To adapt programs to meet the special needs of the target groups, the site school, and the instructional facility

To design and develop assessment instruments to document target groups' achievement and attitudes before, during and after participating in given programs

To field-test programs with selected members of the intended target group(s) to determine the success of the program and procedures with sample group members

To field-test assessment instruments to determine whether they will provide information useful in interpreting the progress of target groups and the success of the particular program

To revise material, programs, and procedures to make them most usable with target groups

To collaborate with other instructional personnel, evaluation specialists, and documentation specialists to report programs used, adaptations made, and results obtained in performance, attitude, cost, time, etc.

Collaborate with other instructional personnel, evaluation specialists, documentation specialists, and members of the target group to determine/verify readiness of the target group for more advanced work on project objectives

Teacher-Intern

Tasks Suggested in rules:

To demonstrate effective interaction/leadership skills

To plan activities and instructional programs for the teacher-interns in the site school that are in keeping with established goals in the proposal

To plan the teacher-intern instructional program in collaboration with: (a) the project administrative staff, (b) the IHE instructional staff, (c) the district LEA inservice instructional staff,, (d) the classroom teachers within the school, and (e) teacher-interns

To plan with classroom teachers to facilitate teacher-interns obtaining practice and experience in skills currently studied at an abstract level with IHE staff

To interact with teacher-interns; hear their administrative, instructional and social needs as they develop; and help interns plan resolution to these needs whenever possible

To maintain a schedule for teacher-interns to coordinate their class visitation schedules within the site school, their IHE and LEA instructional courses, their community involvement projects and their participation in "Special projects" of particular interest to them

To collaborate with IHE faculty, evaluation and documentation specialists to plan the design, instruments, and procedures to assess teacher-intern progress in specified objectives both during a term and during the life of the project

To inform IHE faculty evaluation specialists and documentation specialists about current intern achievements and needs

To provide/obtain advice and special instruction for teacher-interns in areas where practical experience is not available in the site school and formal instruction is not available through the IHE or LEA

To teach teacher-interns by example through being a person who is self-motivated, who follows tasks through to completion, who seeks solutions to problems rather than becoming another facet of the problem, and who approaches other school personnel in a positive, conflict-resolution manner when conflicts do arise

To evaluate teacherintern progress in specified skills, to communicate progress to interns, to plan new instructional approaches for interns when difficult skills arise, and to branch interns to similar activities until they have mastered problem skills

Teacher-Intern

Tasks Suggested in rules:

To demonstrate good study habits during formal and informal coursework

To practice time-management procedures to schedule time among formal coursework, practical classroom experience, community projects, and self-improvement projects.

To interact with community members concerning school needs successes and programs

To plan, design implement, evaluate, and refine programs to complete the "community project" requirements

To use information concerning site-teachers instructional and social needs in interacting with teachers in the school and within their classrooms

To plan and work as a productive member of the teacher-intern team

To easily fluctuate among student-teacher-project manager roles required of interns

To work productively in the classroom with many different classroom teachers possessing varied levels of teaching skills and varied teaching and management philosophies

To work productively with different types of students including wide ranges in achievement, values, behavior, and cultural expectations

To operate under the direction of the team leader, many classroom teachers, IHE instructional personnel and occasionally project administrative staff

To observe and analyze the classroom environment, pupils' motivation, achievement and behavior, instructional and management techniques while in each classroom

To assess the instructional and social needs of students

To convert student need statements into instructional goals for individual/groups of students

To plan/develop/adapt/select instruction to help individual students achieve instructional goals

To adapt, implement, monitor and refine instructional materials and procedures until they are successful with target students

To collaborate with evaluation and documentation specialists to determine the best assessment and recording procedures for their project goals and programs

To design and carry out evaluation and documentation plans and report results of assigned projects in a timely, orderly manner

To recruit volunteers to work in the school while involved in community outreach activities

To be a self-starter in planning, initiating and following through with assigned projects within the school and community

APPENDIX C

Tasks Identified from the Rules and Task Force Related to Start-up Activities

(See also Appendix A from the Research Adaptation Cluster)

Needs Related to New Project Start-Up Activities Identified by the Task Force and from the Teacher Corps Rules

Possible Areas of Need	From Task Force	From TC Rules
I. Finding out about Teacher Corps		
Informing interested educational agencies the purposes and goals of Teacher Corps through a show and tell	x	
Determining Teacher Corps' objectives, priorities, legalities, rules, regulations	x	
Interpreting legal issues concerning Teacher Corps and the IHE, LEA, SEA, and community	x	
Determining and using proposal criteria in planning and developing the proposal for a project	x	
II. Collaborating to plan, design and write a Teacher Corps Proposal		
Planning and establishing the policy board		x
Planning and establishing the temporary community council through elections according to the purposes boundaries, and composition rules		x
Building ownership of the project within collaborating groups	x	
Involving IHE, LEA, and community representatives in developing project objectives		x
Improving relations between legislators and the Teacher Corps staff	x	
Implementing a needs assessment for all participating educational agencies and target groups such as IHE, LEA, SEA, teachers, interns, pupils, etc.	x	x

Possible Areas of Need	From Task Force	From TC Rules
Identifying needs and objectives that affect the entire school		x
Planning jointly for community involvement community-based education programs	x	x
Identifying major objectives and sub-objectives and priorities for each target organization and group	x	x
Integrating personal, institutional and Teacher Corps goals into the design	x	
Negotiating institutionalization ideas with IHE, LEA, community members	x	x
Negotiating employment of successful teacher-interns with LEA		x
Determining a policy toward compensation for released time for LEA personnel		x
Identifying locally available human, technical and material resources available within collaborating groups to help meet each identified need/ objective	x	
Accepting in writing the identified needs and objectives for the project by members of collaborating groups		x
Identifying available graduate teacher-intern training which includes classroom experiences, academic study and practical community experience		x
III. Developing and Writing the Proposal		
Describing Participating Groups		
Describing IHE offerings in graduate education		x
Describing IHE past and present efforts in improving education training/retraining programs		x

Possible Areas of Need	From Task Force	From TC Rules
Describing the LEA and each project school		x
Describing past and current efforts to improve each project school		x
Describing how each project school meets the low income criterion		x
Documenting the conditions and characteristics of the local setting (community)		x
Planning and Describing the Budget		
Describing stipends and compensation (salary, insurance, travel) paid to all salaried staff in the IHE, LEA		x
Describing costs for training Teacher Corps members		x
Describing costs for secretarial and administrative expenses of the community council		x
Budgeting for goals; program development, implementation, evaluation; documentation, dissemination, diffusion; materials; communication; facilities		x
Allocating resources to all role groups and programs		x
Describing Management and Staffing Plans		
Describing proposed activities over a five year period		x
Describing the sequences and timing of proposed activities during a five year period		x

Possible Areas of Need	From Task Force	From TC Rules
Illustrating in detail how the management plan contributes to achieving Teacher Corps objectives: (a) improving the school climate, (b) improving the educational personnel development system (c) institutionalization, and (d) adaptation/adoption of educational improvements by other educational agencies/institutions		x
Describing objectives and the criterion or standard by which the success of achieving the objective may be evaluated		x
Describing recruitment methods to attract Teacher Corps members and administrative staff		x
Describing responsibility for objectives/goals to Teacher Corps members and administrative staff		x
Describing Proposed Project Programs		
Describing the organization of each teacher-intern team in each project school		x
Describing the training programs for teacher-interns		x
Describing the training program for volunteers, aides, teachers and other education personnel		x
Describing in detail program plans for achieving each objective for: (1) participating institutions, (2) participating target groups, (3) demonstration, documentation, evaluation, dissemination, and diffusion, (4) an improved school climate, (5) an improved education personnel development system, (6) institutionalization, and (7) collaboration among the IHE, LEA, SEA		x

Possible Areas of Need	From Task Force	From TC Rules
Analyzing and describing how proposed activities contribute to achieving project objectives		x
IV. Negotiating the Proposal		
Increasing rater-reliability among readers and judges of proposals	x	
Lobbying to get proposal funded	x	
Negotiating amount of funding for a proposal under consideration	x	
Obtaining in writing the approval of the appropriate SEA representative for the proposal		x
V. Initiating the New Project		
Advertising and recruitment for needed personnel including Teacher Corps members and administrative staff	x	
Personnel evaluation and selection		x
Personnel hiring and settling into project		x
Identifying alternative sources of technical assistance for training new staff members (including project directors)	x	
Selecting, requesting, and scheduling technical assistance	x	
Birthing, feeding, and enhancing a viable community council	x	
Maintaining collaboration, communication, planning and involvement of invested groups and individuals	x	

Possible Areas of Need	From Task Force	From TC Rules
Evaluating, reordering, modifying, reprioritizing project goals and objectives as the program evolves and develops in operational/ interactive setting	x	x
Monitoring and facilitating the community council and policy board		x
Employing problem analysis, option identification, and solution generation strategies to build the program	x	
Assigning personnel roles and responsiblities and shifting those planned roles as needed during project evolution	x	x
Planning activities in more detail and sequencing them for the 1st, 2nd, 3rd, 4th, and 5th years	x	x

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APPENDIX D

Tasks Specified as Project Administration Needs Identified from the Rules and by the Task Force

Needs Related to Project Administration Identified by the Task Force and from the Teacher Corps Rules

Possible Areas of Need	From Task Force	From TC Rules
I. Program		
Planning		
Planning programs to meet needs and goals for all target groups including Teacher Corps for 1st, 2nd, 3rd, 4th, 5th years	x	x
Designing and using documentation/information systems to enhance planning/revision decision making	x	
Employing problem solving approach to generate solutions to be identified problems and needs	x	
Providing leadership for engaging all invested groups (IHE, LEA, SEA, Community) in planning and coordinating activities	x	
Developing a more detailed budget and allocating needed resources and facilities to various program components as they evolve	x	x
Scheduling planning activities into a master calendar to enable coordination of all planning activities among all groups		x
Planning and scheduling credits, degrees, and courses for teacher-interns and teachers	x	x
Planning, developing, and sharing newsletters for distribution within the project, district, Teacher Corps, and other interested education agencies	x	x

Possible Areas of Need	From Task Force	From TC Rules
Providing help to other interested education agencies to enable them to adopt or adapt successful programs and procedures from their project into their agencies	x	x
Achieving basic systematic improvements in the IHE and LEA in training systems for education personnel		x
Encouraging a capability in the IHE to provide training for education personnel for specified field generated goals		x
Institutionalizing successful products, processes, and practices in the IHE and LEA	x	x
II. Personnel		
Monitoring the success of Teacher Corps members, administrative staff, IHE, and LEA participants concerning their skills to carry out responsibilities	x	x
Identifying, securing and scheduling training and technical resources to improve the ability of the staff to carry out assigned responsibilities	x	x
Monitoring Programs		
Monitoring and documenting pertinent information about ongoing programs	x	x
Monitoring all Teacher Corps projects as they multiply	x	

Possible Areas of Need	From Task Force	From TC Rules
Evaluation/Revising Programs		
Summarizing documented information about planning, developing and implementing information		x
Analyzing summarized data and providing analysis to all invested groups for decisions about continuing, modifying, or eliminating certain programs and procedures	x	x
Revising program, the role of assigned personnel, the expectations of target groups, and/or the implementation process as prescribed by collaborating groups		x
Disseminating/Diffusing Successful Programs/ Procedures		
Sharing information about successful ideas, programs and processes with all invested groups		x
Planning and writing technical interim reports concerning the progress made to date in the project		x
Designing a better education personnel development system		x
Planning broader programs of teacher education (models of preservice/inservice teacher education)		x
Developing/Adapting		
Selecting, adapting and/or developing programs materials, and procedures to specifications established during the planning stages		x

Possible Areas of Need	From Task Force	From TC Rules
Field-testing and revising programs prior to full scale implementation within the project		x
Involving all invested groups somewhere in the development, field-test, decision process for programs		x
Implementing Programs and Procedures		
Scheduling implementation of new programs with a sensitivity to ongoing programs and responsibilities of target groups	x	
Monitoring, evaluating, and adjusting time assigned to provide programs, to staff providing programs, and to target groups receiving programs		x
Scheduling released time for interacting personnnel to identify and resolve problems as they occur		x
Investigating alternative roles for project staff	x	
III. Communication		
Enhancing interpersonal relations among interacting groups	x	
Initiating trust-building activities among interacting groups	x	
Encouraging and facilitating continued collaborative efforts among interacting groups	x	x

Possible Areas of Need	From Task Force	From TC Rules
IV. Leadership		
Encouraging staff to fulfill responsibilities and rewarding effective work	x	x
Encouraging appropriate risk in interacting groups	x	
Developing a detailed plan for the next year of the project		x
Developing a detailed budget for the next year of the project		x
Developing an outline of project activities and related budget for subsequent project years		x

APPENDIX E

Tasks Related to Project Curriculum and Content as Identified by the Task Force and by Dwight Allen

Needs Related to the Content and Curriculum of Projects Identified by the Task Force and from the Teacher Corps Rules

Possible Areas of Need	From Task Force	From TC Rules
I. Community		
Using enrichment activities for persons with low economic backgrounds	x	x
Encouraging community service in students, faculty, community members	x	x
Providing parent education	x	x
Building a hope factor (responsible for selves, parents and students)	x	
Changing apathy among target groups (parents, students, school personnel)	x	
Becoming knowledgeable and sensitive to the needs of diverse cultures	x	x
Improving the school climate	x	x
Changing the learning environment	x	x
II. Students as Learners		
Becoming literate about using computers	x	
Encouraging student responsibility	x	
Learning about alternative career choices	x	
III Teaching Methodology		
Matching teaching/learning styles	x	
Developing instruction for exceptional students	x	

Possible Areas of Need	From Task Force	From TC Rules
Using alternative discipline strategies	x	
Using effective humane classroom control	x	
Applying research findings in teaching methods	x	
Using knowledge of youth culture in instructional planning	x	
Keeping students on task humanely	x	
Using failures as lessons others can learn from	x	
Using preventive discipline in the classroom	x	
Using audio-visual aids in the classroom	x	
Encouraging, channeling student choices	x	
Using new teaching strategies and techniques	x	
Planning instruction/procedures accounting for a wide range of variability in children		x
Identifying students' learning and behavior problems		x
Diagnosing special needs of children with learning and behavior problems		x
Prescribing learning activities for students with learning and behavior problems		x
Meeting special education needs of juvenile delinquents and youth offenders		x
Improving the learning environment	x	x

Possible Areas of Need	From Task Force	From TC Rules
Using remediation strategies with identified students	x	
IV. Teacher Corps Administrative Staff/Members		
Identifying and using models for retraining teachers	x	
Implementing studies on changing the school curriculum with IHE, LEA and SEA	x	
Using knowledge of grantsmanship to plan, develop, finance, evaluate, and implement educational innovations	x	
Identifying alternative strategies for the IHE and LEA considering decreasing student enrollments	x	
Describing the basis for each project objective in research, theory, and/or practical experience		x
Improving the competency of all educational personnel in the IHE and LEA		x
Identifying succesful means of training staff to provide remedial basic, and secondary education training for youth offenders		x
Providing strategies and materials to enhance multi-cultural education and activities	x	x
Using various collaborative planning processes	x	x
Providing leadership and motivation for institutionalization of successful processes and procedures	x	

Possible Areas of Need	From Task Force	From TC Rules
V. IHE and/or LEA		
Using economics and politics to improve local educational opportunities	x	
Implementing improved systems of providing inservice and preservice training for all education personnel		x
Blurring age-grade level categories to enhance "learning where you are"	x	

POSSIBLE FOCUS FOR TECHNICAL RESOURCE ASSISTANCE IN CURRICULUM

Submitted to the
Technical Resource Task Force
by
Dwight W. Allen

October 17, 1977

POSSIBLE FOCUS FOR
TECHNICAL RESOURCE ASSISTANCE
IN CURRICULUM

I. Administrative and Structural Variations

High school apprenticeship program (experience with business, tutors, hospital volunteers) during school hours. Similar to ALPS

Team teaching a block of students to create a junior or senior high mini-school

One thematic, integrated day each week for elementary students (topics in academics, games, physical education, exploring art, etc.)

"Distinguished Visitors" Program - international speakers, state, city and national men and women of distinction offer seminars to high school and middle school students

Cross-age tutoring at the middle and elementary school levels

Individualization through administrative flexibility: modular curriculum, mini-courses, open-ended learning activity packages, mentor program, etc.

II. Professional Development

Integrating elementary specialists (music, art, etc.) into the regular curriculum

Metric in-service for teachers (tied to Title I remediation activities)

Research and Development support for innovative, "child centered" units

III. Parent/Community Involvement

Bi-lingual, bi-cultural exchange between Hispanics and Anglos

Mini-courses and special "clubs" on all or part of a day (Friday is typical), portions of a week. Parents and community people are resources

Parent math workshop - "tutoring" the home tutors, also Parent-reading workshops

In-service career education for guidance counselors elementary and secondary

Life-long Lrarning - parents as students and teachers

Changing Families in a Changing Society - focus on family-centered activities

Nutrition as a fundamental in the learning process - family health and survival in the 20th Century

IV. Special Needs

Special remediation and enrichment programs for "special needs kids" (includes gifted and talented)

Moral, ethical issues, "principles of justice" based on Kohlberg's theories of moral development (junior and senior high, plus parents)

Cross-cultural counseling for middle school students

Special needs math tutors ("specialists" at elementary level, seminars at secondary level)

Special therapy programs for the multi-handicapped - strong family links for support

Returnee programs for drop-outs

Project SELF: self concept improvement through shared decision-making, community service, cross-age tutoring, etc.

Learning Activity Packages for the Gifted and Special Needs Child

V. English/The Arts/Languages

Cultural approach to language learnng - beginning with ethnic membership of class and moving to the "more exotic"

Special projects to link written and oral expression with trade skills

Poetry for Boys/Math and Mechanics for Girls - experience and *exploration for elementary children*

Aesthetics and the American Way: the arts as carriers of culture, appreciation, and participation

VI. Science/Environment/Math

Environmental task forces - cooperative work projects for middle school students

Math lab - a special resource center for math games, puzzles, projects

Practical biology/nutritional practice: gardening

VII. Social Studies

Cultural/Ethnic Discoveries Club middle school field trips, visiting speakers. projects

Student written history books - all levels

Alternative Futures in Tomorrow's World - the difficult choices of Future Studies

Occupational exploration without stereotypes combatting sex bias in occupational roles - guest speakers, counselling, exploration

A Job vs. Work vs Leisure: an examination of meaningful lives in a technological society (Helen and Scott Nearing, Studs Terkle, etc.)

Contemporary problems (energy, racism, environmental issues, etc.) Choice and decision-making in shades of gray

VIII Expanding the Right to Read

Special Summer Reading Program

Individualized Reading in Kindergarten

StoryoftheMonth Contests

Reading Readiness in Pre Schoolers

APPENDIX F

Tasks Identified from the Rules and Task Force Related to Project/Program Evaluation

Needs Related to Project Evaluation Identified by the Technical Resources Task Force and from the Teacher Corps Rules

Possible Areas of Need	From Task Force	From TC Rules
I. Conducting Up-Start Needs Assessments		
Identifying variables of interest for each institution	x	x
Identifying variables of interest for each target group	x	x
Identifying variables by definition from Teacher Corps rules	x	x
Identifying independent (biographical) variables of interest that may affect target groups' performance on each identified dependent variable	x	x
Searching existing data sources for each institution to determine whether information on target groups' performance already exists in some form		
Constructing or selecting instruments or methods of assessing/measuring identified variables when no other source of data exists		
Determining standards or criteria by which target group performance will be considered successful on each variable	x	x
Using data gathered or obtained through existing files, describe the current status of target groups on each variable relative to the established standard		

Possible Areas of Need	From Task Force	From TC Rules
Selecting and prioritizing needs on the basis of the criticality of the need to the over-all plan and the size of the discrepancy between the standard of performance and the current status of target groups	x	x
II. Identifying Local Project Resources (Personnel, Materials, Facilities)		
Identifying existing and non-existing personnel, materials, and facilities to provide regular program for each target group and goal priority		
Identifying options and trades to obtaining satisfactory personnel, materials and facilities		
Identifying criteria to use to select among identified options and trades		
Modifying goals and subgoals to meet personnel, materials, and facilities "options and trades" decisions		x
III. Designing Evaluation Studies		
Contacting and planning with all personnel hired to deliver programs and/or instruction to target groups in order to meet specified goals		x
Adjusting goals and priorities from the overall project plan and from the expertise and interests of the provider to identify viable goals for each section of their program (scope, time, sequence, etc.)	x	x

Possible Areas of Need	From Task Force	From TC Rules
Brainstorming with program personnel to identify various options to measuring target groups' performance on goals for each section of their program (variables, instruments, timing, design)	x	
Providing technical assistance to program staff to develop items, instruments, and assessment methodology (designing, developing, and field testing materials and plans) and research design (control groups, pretest/post-test, repeated measures, etc.)	x	x
Planning and coordinating assessment implementation in the site school(s) for all target groups (when, who administers, how)		
Designing collaborative formative evaluation studies that provide project decision makers with information about the current effectiveness of instructional materials, procedures, equipment, personnel, facilities, schedules, target groups, etc. for ongoing project improvement	x	x
Providing technical assistance for planning and coordinating scoring, synthesis, and analysis of test data	x	x
IV. Creating Documentation for Programs		
Converting data gathered into a form that will enable it to be recorded and stored in an ongoing data system (hand file, computer storage, etc.)		
Maintaining/modifying data storage system (documentation) to suit project decision needs (format, timeliness, readability)	x	x

Possible Areas of Need	From Task Force	From TC Rules
Documenting the data storage system and each instrument used in the project to ensure that project evaluation does not become "person specific" but can be used by many (no marvelous number secrets)		
V. Reporting the Results of Assessments/Evaluations		
Determining who should be involved in making decisions about keeping, modifying or chalking programs or procedures for each target group		
Determining when go, modify, no-go decisions will need to be made		
Determining the best format for presenting findings, options, and decision criteria		
Consulting with program personnel in interpreting program impact data for each target group	x	x
Modifying goals; programs; instruments; testing procedures; data summary, and analysis, and reporting procedures to better suit the requirements of program personnel and target groups	x	x
Collaborating with program personnel in designing and writing evaluation sections of interim and final reports	x	x
Collaborating with external evaluators, when available, to: (1) validate evaluation designs, instruments, and procedures and (2) validate impact performance and attitude results obtained in internal, ongoing evaluation studies		

Possible Areas of Need	From Task Force	From TC Rules
Demonstrating effective evaluation designs, instruments, and documentation systems to others for adoption/adaptation into similar programs	x	x

APPENDIX G

An Example of Needs Classified Using the Teacher Corps Four Major Criteria and the Five Givens

Multicultural, Cross-Cultural

Developing cross-cultural multi-ethnic community skills across a variety of cultures

Community

Planning and delivering community-based education

Training for election of community school councils

Helping the school and community identify needs and set goals

Birthing, caring for and feeding viable school/community councils

Making community components more functional

Enhancing collaborative governance by effectively using the community council and policy board

Planning and using techniques and strategies for meaningful community involvement in the project

Providing parent education for those with less than school age children

Using preschool centers as a possible community - education area

Encouraging student community service

Learning how to work effectively with community volunteers

Instructional Practices

Blurring age and grade levels for learning

Applying discipline from a preventive viewpoint

Learning multimedia techniques for instruction

Using audio-visual aids effectively

Training teachers to keep students on task and still maintain a humane environment

Training for effective and humane classroom control

Inservice and Staff Development

Planning strategies for inservice and staff development

Planning and using alternative strategies for university and public schools in light of decreasing student enrollments

Planning and using alternative roles for project staff members

Developing roles for all education staff in improving the program and school

Employing staff/student motivation and incentive systems

Planning and using strategies for involving teachers in retraining activities

Learning how research on teaching gets applied in classrooms

Curriculum Development

Planning alternative ways of delivering exceptional child education

Providing pupil remediation

Providing enrichment for children with low economic backgrounds

Identifying youth advocacy needs

Planning and implementing strategies for dealing with apathy

Helping kids with the hope factor (what they do will make a difference in their lives)

Encouraging student responsibility (their life counts and they should be responsible for it)

Encouraging, directing and channeling student choices

Teaching computer literacy to student

Providing career education in the curriculum for students

Implementing future studies on school curriculum

Planning and implementing curriculum revisions

Changing the curriculum in LEAs and IHEs cont. Inservice and Staff Development

Training for implementing the program

Developing support systems for new educational personnel (teachers, teacher aides, etc.)

Understanding youth culture

Providing time for education personnel to try different things

Learning and using various models of team approaches

Increasing process decision-making skills

Improving teachers' self-concepts

Providing instruction in broader categories such as the economics and politics of education

Learning how to function politically

Getting university credit, degrees and compensation for interns and classroom teachers

Improving the inservice/preservice teacher education programs of the IHE and LEA

Studying, selecting and applying viable models for inservice training of education personnel

Enhancing decision-making skills among IHE and LEA members

Interpersonal Education

Building a climate of trust among the school, community and project personnel

Assessing and encouraging appropriate levels of risk for all persons interacting in the project

Improving public relations on the local, regional, and national levels

Building better interpersonal relations among interacting persons in the project

Learning to deal with problem people

Document, Evaluate
Disseminate and Diffuse

Using our failures as lessons others can gain from (analysis of problems/failures)

Learning documentation/evaluation strategies and techniques

Demonstrating, disseminating and diffusing the best of Teacher Corps

Establishing criteria for success in institutions and individuals

Establishing criteria for redirecting project efforts in process

Being aware of and using alternative evaluation strategies that suit given needs

Using standard methodologies for summarizing and analyzing data gathered in the project

Using numbers to lie

Using evaluation information for project improvement

Management

Interpreting legislation as metamorphosis, intent, or mandate

Interpreting legal issues, laws, and sanctioned activities

Training in grantsmanship and proposal writing for administrative and Teacher Corps staff

Lobbying to get the proposal funded

Using a protocol group or team approach

Being aware of and coordinating project resources for all possible role groups

Recruiting staff for identified role groups

Enhancing project communication through bulletins and newsletters

Planning a research design for the five year period

Enhancing project and school leadership as a high correlate of success

Establishing criteria for requesting technical assistance

Planning skills for the 1st year of the project

Monitoring projects as they multiply over the years

Improving communications and public relations between legislators and The National Teacher Corps group

Developing alternative sources for technical resources

Providing management skills for new program directors

Providing a technical report series which includes both internal and external resource bulletins

Providing released time for project and site staff to address problems

Institutionalization

Integrating personal, institutional and community goals into the project design

Planning and using strategies for institutionalization (change strategies)

Training in various discipline strategies

APPENDIX H

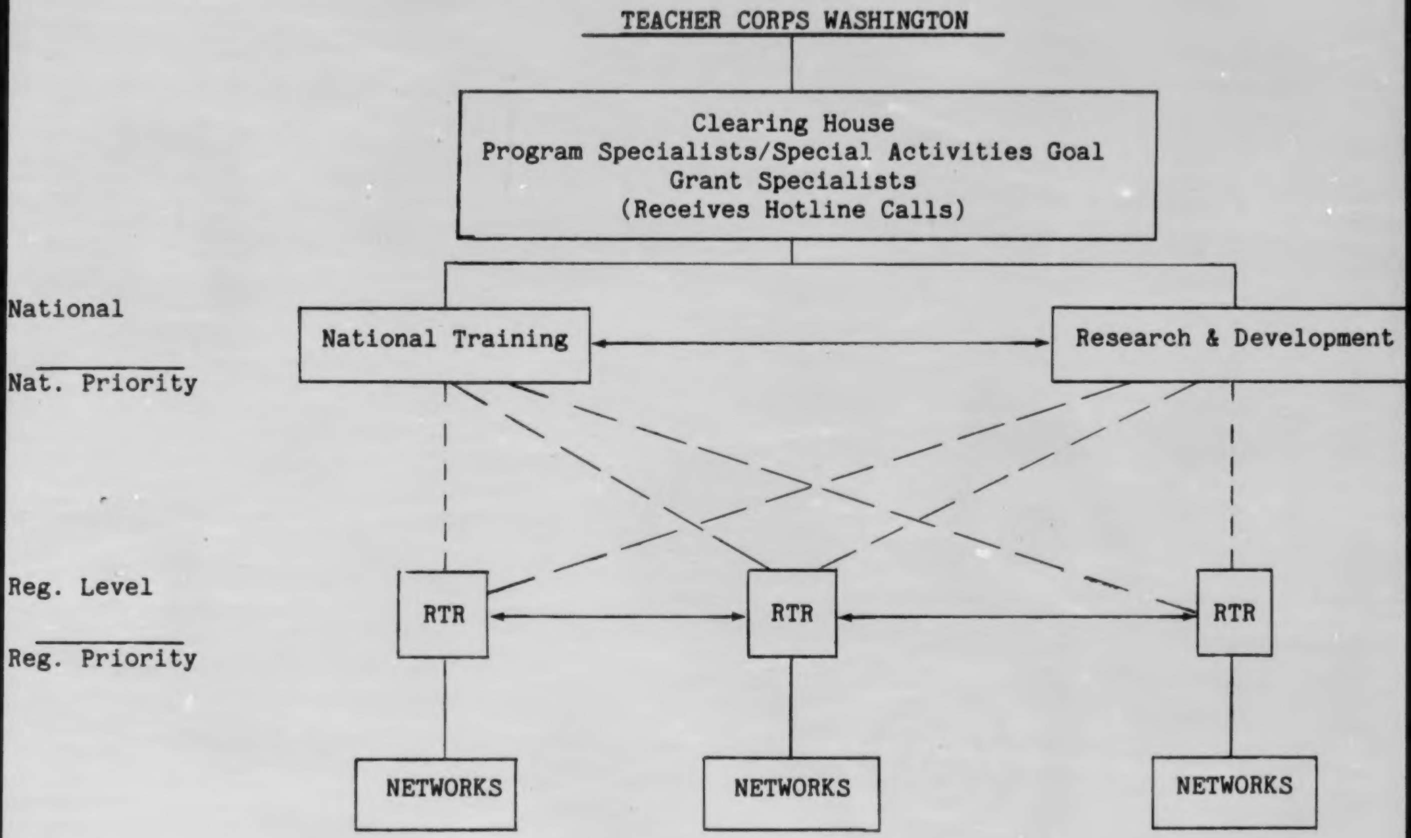
A Suggested Technical Resources Organizational Model Proposed by the Task Force

We propose the establishment of a National Teachers Corps Technical Resources Center. This Center will have three offices: (a) A National Training Institute, (b) Technical Assistance Information Clearinghouse, and (c) A Teacher Corps Research and Development Office. The organization form of these offices can take numerous forms. We have suggested three (see the accompanying charts).

Each of these offices will have distinct, but related functions.

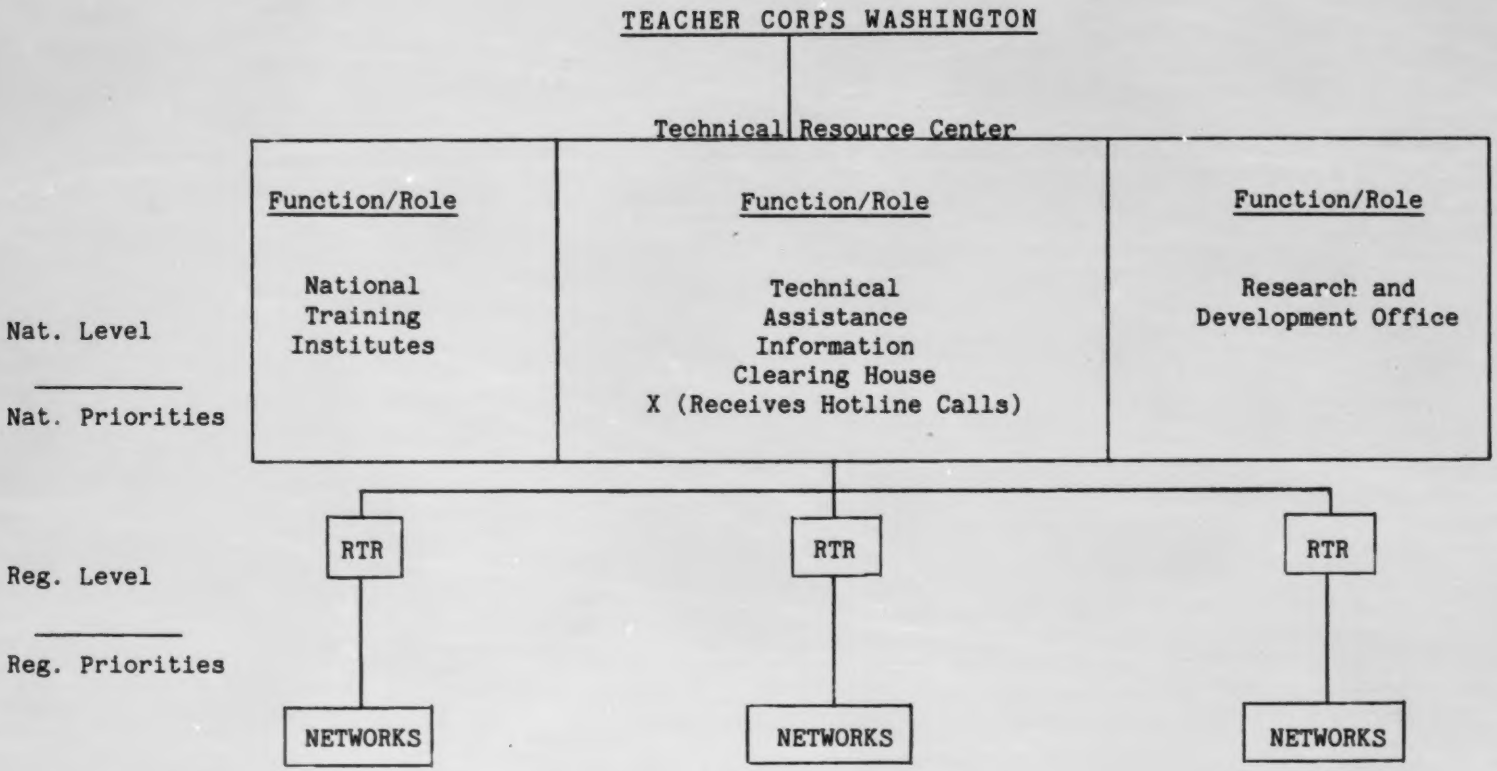
1. The National Technical Resources Center is designed to ensure efficient development of support and resources to the total Teacher Corps effort.
2. National Training Institute addresses the mandate of training needs, such as national conferences, CMTI, etc. It will conduct training and orientation of Teacher Corps directors.
3. Technical Assistance Information Clearinghouse is an office designed to provide Teacher Corps personnel at all levels, particularly the project level with information on the location of materials and human resources in response to identified needs.
4. Research and Development Office addresses major concerns arising from the field, mandated by legislation, and coming out of the regulations. A role of the National Office is to help in the identification and prioritization of the issues and problems to be addressed by the Research and Development Center.

Recruitment and Technical Resource Centers perform the same functions and roles as the National Technical Resource Center, but at a regional level. These centers are designed specifically to respond to regional priorities.


TEACHER CORPS WASHINGTON
Clearing House
Program Specialists/Special Activities Goal
Grant Specialists
(Receives Hotline Calls)
National
Nat. Priority
National Training
Research & Development
Reg. Level
Reg. Priority
RTR
RTR
RTR
NETWORKS
NETWORKS
NETWORKS

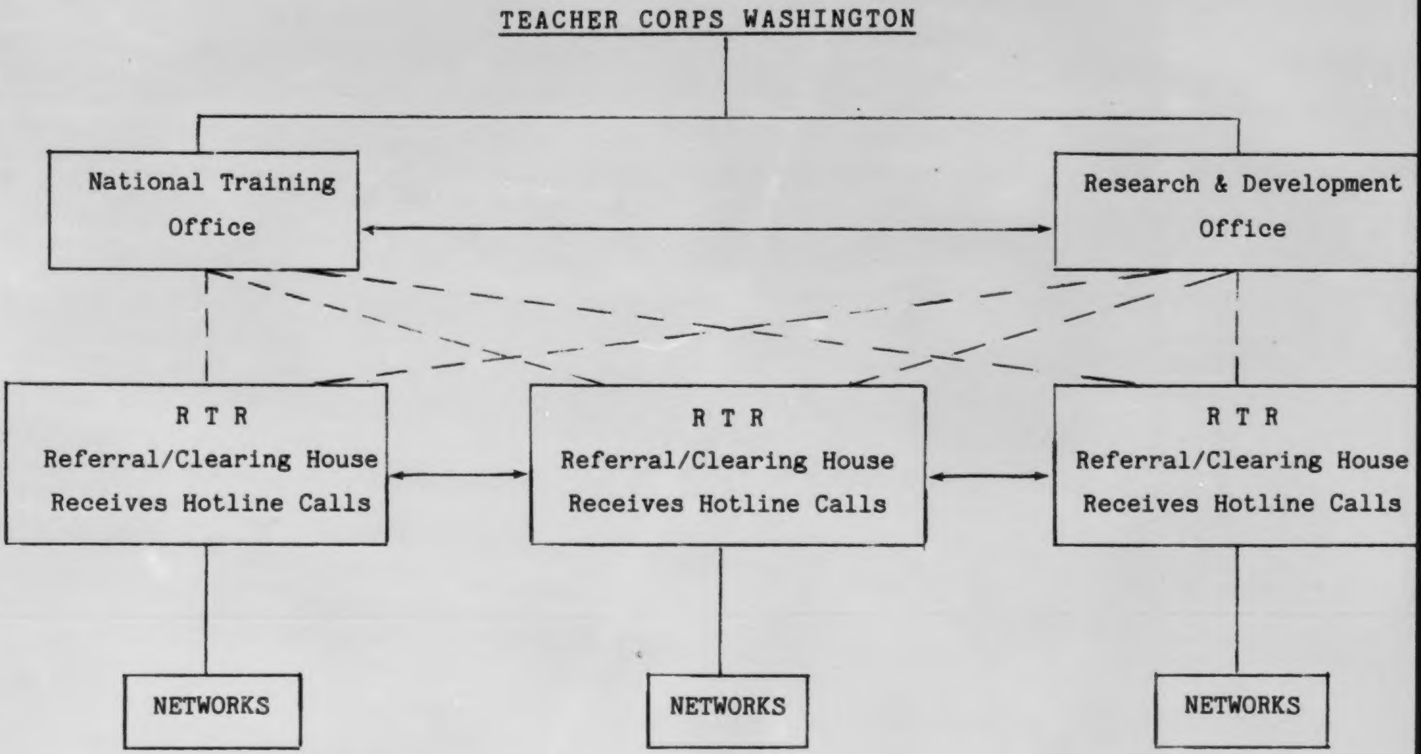
x - Project

Hotline to Clearing House from Project


TEACHER CORPS WASHINGTON
Technical Resource Center
Function/Role
National Training Institutes
Function/Role
Technical Assistance Information Clearing House
X (Receives Hotline Calls)
Function/Role
Research and Development Office
Nat. Level
Nat. Priorities
RTR
RTR
RTR
Reg. Level
Reg. Priorities
NETWORKS
NETWORKS
NETWORKS

X - Projects

Hotline - from Project to Technical Assistance Information Clearing House in Technical Resource Center.

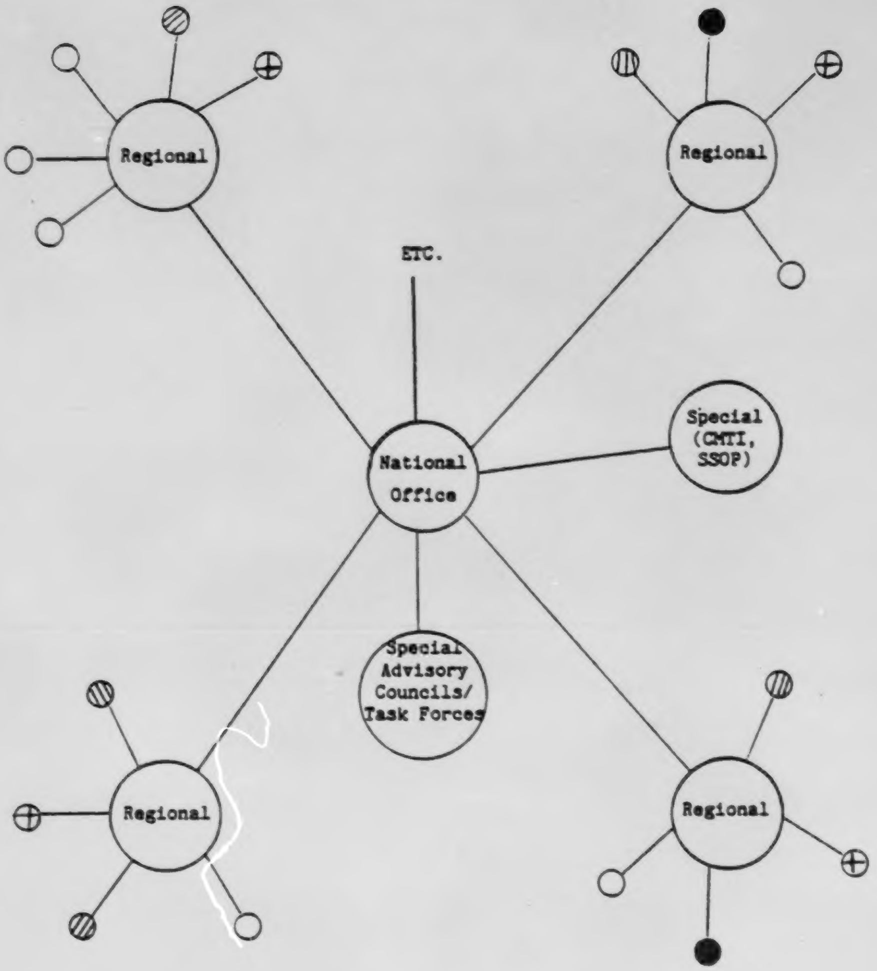

TEACHER CORPS WASHINGTON
National Training Office
Research & Development Office
R T R
Referral/Clearing House
Receives Hotline Calls
R T R
Referral/Clearing House
Receives Hotline Calls
R T R
Referral/Clearing House
Receives Hotline Calls
NETWORKS
NETWORKS
NETWORKS

X - Projects

Hotline from project to RTR

APPENDIX I

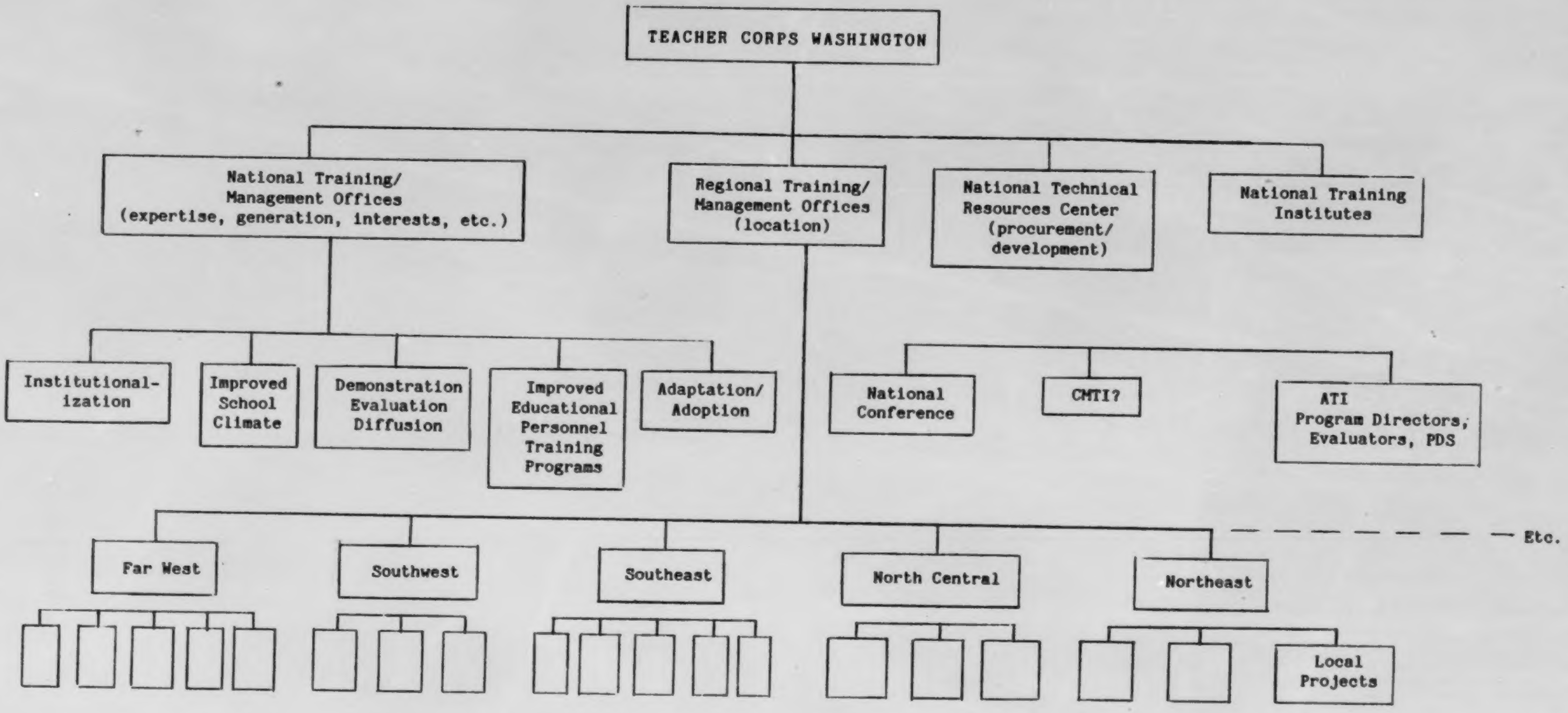
Two Preliminary Sketches of Technical Resources Organization Models


Regional
Regional
ETC.
National Office
Special (CMTI, SSOP)
Special Advisory Councils/ Task Forces
Regional
Regional

Sample Project Interests

- ▥ - Projects concerned with institutionalization/change modesl
- ⊕ - Projects concerned with management/evaluation/diffusion strategies
- ● - Projects concerned with community issues
- ○ - Projects belonging only to regional networks

A Diagram of Hypothetical Project Groupings for Technical Resources


TEACHER CORPS WASHINGTON
National Training/ Management Offices (expertise, generation, interests, etc.)
Regional Training/ Management Offices (location)
National Technical Resources Center (procurement/ development)
National Training Institutes
Institutional-ization
Improved School Climate
Demonstration Evaluation Diffusion
Improved Educational Personnel Training Programs
Adaptation/ Adoption
National Conference
CMTI?
ATI Program Directors, Evaluators, PDS
Far West
Southwest
Southeast
North Central
Northeast
Etc.
Local Projects

A Preliminary Sketch to Help Conceptualize the Organization of Technical Resources

APPENDIX J

A Summary of Current Teacher Corps Technical Assistance Organizations

Provided by

Beryl Nelson

Technical Assistance

Teacher Corps Washington supports a number of activities intended to improve opportunities for projects to deal successfully with emerging educational trends and increasingly complex organizations. These activities fall into three distinct categories, currently referred to as Project Technical Assistance, Program Technical Assistance, and Management Technical Assistance. (For Task Force purposes only, we group these as Technical Resources.) While all three are designed to assist projects, and/or the program as a whole, each represents a distinct approach to problem-solving, somewhat characterized by an external/internal difference.

1. Project Technical Assistance: Broadly, project technical assistance is an activity designed outside of a project's operating scope but uniquely in support of the individual project. Decisions for technical assistance at the project level usually are made by project directors individually. However, some modes of technical assistance are designed by Teacher Corps Washington in conjunction with project personnel but are delivered individually to projects so as to meet unique internal and specific needs.

    A. Site Specific Orientation Project (SSOP): The SSOP is project technical assistance designed to provide help for each newly funded

Teacher Corps project. A team of consultants visits each project close to the initiation of activities and performs an analysis of potential or actual problems, based upon a project need analysis, and recommends strategies for project development. It assists the project in planning its overall response. Funds for SSOP are provided through a contract for Teacher Corps Washington.

B. Special Project Technical Assistance: Other forms of such technical assistance may be delivered to/or provided for projects under usual circumstances, (e.g., crisis conditions caused by emerging or unpredicted project management and/or by a radical change in the educational institutions). Project budgets may provide for such assistance (which will be designed by the project director in consultation with the program specialist), or the Operations Branch at Teacher Corps Washington may provide the design and resources.

2. Program Technical Assistance: Program thrusts, emerging trends, and overall needs, any of which may require training, documentation, dissemination of information, or program development fall within the category of program assistance. In general, such assistance is targeted to all projects within Teacher Corps, or to groups of projects with certain common characteristics; it deals with areas of concern which provide for the impact of Teacher Corps national program emphasis. Program technical assistance is planned by the Development Branch at Teacher Corps Washington, usually with input from the field. Funds for such assistance are delivered through contracts. In general, activities are

planned on a year-to-year basis so as to be responsive to current program needs, although several activities are recurring:

A. Teacher Corps Networks: Groups of projects have been organized either by geographical contiguity or in two cases, common themes. Networks are governed by a board of directors composed of the directors of each of the involved projects. Each Teacher Corps project is included in one geographical network. Each network plans activities which are meaningful to all members of the projects, including special role group training, preparation of documentation, program development sequences, etc. Additional network activities include, e.g. collaboration with professional organizations, special role group training and analysis of trends/needs within the network areas. Each network is supported by a grant to a Teacher Corps funded institution within that network. Additional funds may also be provided to a single network for a special program delivery.

B. The National Workshop: Each year Teacher Corps has traditionally sponsored a national training workshop for project staffs and other field personnel. The major purpose of this activity is to train and inform staff in areas of major concern as identified by project personnel. It also provides a personal identification with the national program effort. The workshop is designed to highlight these concerns through a series of presentations and meetings providing a great many options for projects. Each project budgets travel and related expenses for staff attendance. Teacher Corps Washington, with the field, designs the workshop and then contracts for its operation.

C. The Corpsmember Training Institute (CMTI): The initial intern summer is designed in common for all interns to provide educational experiences in special critical areas and to give interns an opportunity to interact with the broad multicultural diversity represented in Teacher Corps. The program is generally three weeks at a university site. Team Leaders are also required to attend CMTI, sharing experiences with interns as well as pursuing programs of special training for their role. CMTI is funded annually by contract and all projects are required to send their selected interns and team leaders.

D. Teacher Corps Associates: This leadership training program provides an opportunity for study and special internship-type experiences for potential leaders in education who are on project staffs and who are either female or from ethnic minorities. Nominations are received from project directors for this oneyear experience which concentrates in the areas of teacher education, educational leadership, and education that is multicultural. Associates remain with their projects but accept additional training opportunities and responsibilities. The Associates is funded annually by contract

E. Special Program Technical Assistance: Program needs and emerging trends may indicate areas where program emphasis added training. special inter and intra-agency relationships, or constituent collaboration appears beneficial to the national effort. When an area is defined by Teacher Corps Washington staff as pertinent to its national mission a contract is awarded.

Examples of such special contracts and studies would include: the development of program materials. the application of a cost/benefit model to Teacher Corps study of the four inservice models developed under an earlier contract, the planning for a state wide model of collaboration in teacher training, and others.

3 Management Technical Assistance: Management Branch Technical Assistance is designed to lend support to the projects as well as the national program including the development

and operation of the management information system.

A. Recruitment and Technical Resources (RTR) Centers: Teacher Corps contracts with three regional centers for the purpose of providing project oriented technical assistance. Under earlier legislative authority this assistance was limited to recruitment and start-up help for new projects. Recent amendments provide that the RTR Centers may provide assistance requested by a project within an enlarged scope of activities. This includes management problem solving (organizational analysis/management planning), personnel recruitment staffing, individual consulting on any matter related to project management, monitoring and closeout visits, and other such special activities as designated from time to time.

B. Community Based Education: Management Technical Assistance is provided to projects to expand and coordinate available opportunities for community involvement in educational planning and decision-making in Teacher Corps. It also provides for the development of appropriate materials as well as the training of project and community personnel.

4. Special Contracts on Studies: When an area is defined by Teacher Corps/Washington as pertinent to its national mission, and does not fit into any of the above three categories a special procurement is made. Example of such procurement would include the National Council of States, the developing needs for training and materials in the areas of early childhood and continuing education, and others.

APPENDIX K

Resources and Delivery Methods That Can Be Available Through Technical Resources

Resources That Could Be Available Through A Technical Resources Program

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National staff members

Examples of successful ideas, materials, procedures

Expert consultants in the field

Outside agencies local or distant (foundations etc.)

Individualized instructional materials (audio-visual)

Last year's wheels that work

Materials developed in other programs and kept in a central materials bank

Free and inexpensive materials available through the government printing office, Smithsonian, or foundations with similar interests

Handbooks or workbooks developed for a specific problem (evaluation, demonstration, administration, etc.)

A panel of experts

Professional organizations

Professional journals

Position papers

IHE materials, library, personnel

Business literature

Military literature

Anthropologists

SEA resources and instruction

LEA resources and instruction

Delivery Methods to Provide Technical Resources For Teacher Corps Projects

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Mailing self-instructional materials

Providing a hot line or answering service to help locate resources or provide immediate solutions/advice

Sharing ideas among projects by role groups in conferences

Sharing ideas among projects through newsletters, quarterlies, monographs, etc.

Providing simulations or exercises on desired skills in workshops

Monitoring projects and providing feedback

Using juxtaposition to increase understanding on interplay of ideas/persons/variables

Using staff exchanges

Providing formal and informal courses from the IHE, LEA, SEA

Using project inter-intravisits

Providing an emergency ward where project members can go for immediate treatment

Using a retreat to relieve personnel from problems while studying optional solutions

Using group process techniques

Using a "free-safety" concept of consultant to work with any group or problem

Providing renewal training to update skills, understandings

Using crisis intervention techniques

Planning charettes where interacting members are locked up together to reach consensus

Providing decision seminars where options and criteria are aired and collaborative decisions made

Using regional/national linking systems to facilitate sharing in the field

Providing a central information/resources management system

Planning local, regional, and/or national conferences to share ideas and materials

Planning local, regional and/or national workshops

Securing a cadre of expert consultants to carry skills/ideas into local projects

Visiting and observing in a project as a nonparticipating member

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APPENDIX L

Case Studies to Illustrate Systematic Planning of Technical Resources for Selected Needs

A Case Study of the Analysis of One Problem Area for the University

				When				
Problem Area	Possible Types of Assistance	Audience (To Whom)	Level of Assistance	Year 1	2	3	4	5
1. Communicate Objectives as seen by Teacher Corps Washington/Local Project/ University	1-A. Meetings of Faculty for verbal presentation and discussion	1-A. University Faculty	1-A. Local (Dean, Dept. Head and Project Director	1-A. March - June				
	1-B. Written document that specifies objections	1-B. University Faculty	1-B. Local (Project Director)	1-B. March - June				
2. Develop Collaborative governance concept relative to: A. New degree programs B. Certification requirements C. Delivery Systems for inservice education D. Personnel E. Evaluation of Programmatic and instructional effectiveness	2-A. Needs assessment workshops	2-A. IHE/LEA/Community						
	2-A. Outside consultants	2-A. IHE/LEA/Community	2-A. Local, Regional, and National	2-A. July and August				
	2-B. Conferences and consultants	2-B. IHE/LEA	2-B. Regional (State Depts)	2-B. July - Sept.				
	2-C. Planning workshops, minicourses, conferences for instruction in basic skills/diagnostic-prescriptive teaching/multi-cultural education/etc.	2-C. Appropriate role groups	2-C. Local/National/Regional	2-C. July - June				
	2-D. All of above	2-D. Same as 2-C	2-D. Same as 2-C	2-D. Same as 2-C				

A Case Study of Analyzing the Technical Resource Requirements for the Development of Effective Community and Advisory Councils

Problem Area	Audiences	Possible Types of Assistance	Level of Assistance	(Pre Fund & 1st yr.) When
A. Development of Effective Functioning, elected community and advisory councils	A-1. Adm./Policy Bds. of Sch. Dist. & Univ., Directors or Exist. Proj.; possible Exist. A.C.	A-1. Dev. & dist. of printed material concerning regulations on A.C. and suggestions for alternative strategies to meet requirements	A-1. Teacher Corps, Washington	A-1. Apr. - June, 1978
	A-2. Same	A-2. Dev. & dist. of printed material concerning possible uses of budget for this objective	A-2. Teacher Corps, Wash.	A-2. Same
	A-3. Project Director	A-3. Intensive training workshops on adv. comm. election, structure, roles, relationship/P.B., survival for project dir.	A-3. 1. Teacher Corps, Washington 2. National Consultants	A-3. July - Aug., 1978
	A-4. Proj. Direct., Univ. & Dist. Adm.; Site Adm. & Staff, Community	A-4. Intensive local workshops on birth, care, feeding of advisory council-structure, role/function, limitations, survival tech.	A-4. 1. "Regional Center" 2. Local resources	A-4. Sept. - Nov., 1978
	A-5. Proj. Director	A-5. Workshop on goal setting-needs assessment	A-5. 1. Teacher Corps, Washington 2. "Regional Centers" 3. Local Resources	A-5. Dec. - June, 1979
	A-6. Proj. Director; Site, Dist., Univ. Adm., Staff, Community	A-6. "Hotline," telephone asst. on special problems		
	A-7 Proj. Direct., Site, Dist., Adm., Staff, Community	A-7. Training session for new personnel, replacement personnel	A-7/9. 1. "Regional Centers" 2. Local Resources 3. Packages	year 2 - 5
		A-8. Continual use of "hotline" by Director on specific problems		
		A-9. Continued inservice of specific needs of A.C.-needs assess., prioritizing goals, & objectives, implementation and evaluation		
		A-10. Assist in development of dissemination models for in-district and out-of district dissemination and the role and function of effective A.C.	A-10. 1. Teacher Corps, Washington 2. "Regional Centers" 3. Local Resources	year 5

APPENDIX M

A Presentation on Technical Resources

by

Keith Acheson

At The Research Adaptation Cluster Conference

1977

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BEYOND THE FIVE DIMENSIONS OF DEMONSTRATION TO TECHNICAL ASSISTANCE

Keith A. Acheson

(from a speech given to the Research Adaptation Cluster,
Teacher Corps, Chicago - October 26, 1977)

Teacher Corps/Washington has three task forces at work and it is interesting to note that the topics chosen are the same as the ones that the Research Adaptation Cluster has emphasized over the past three years. Two years ago we produced a monograph on evaluation, last year one on demonstration, and the emphasis in our first conference this year is on technical assistance. The third task force is called technical resources, but essentially one must conclude that the leadership in Washington is interested in the same problems that we are. This interest has probably been stimulated by anticipating what five year funding is going to be like for Teacher Corps projects. In addition to those three task forces, The National Diffusion Network is also involved in these topics. NIE has produced some case studies that were done by the Center for New Schools. Other publications such as the RAND study and some by the Stanford Research Institute concern themselves with national diffusion of educational innovations. I want briefly to compare some of their conclusions with ours which were expressed in The Five Dimensions.

To us, "demonstration" meant describing what you are going to do or what you are doing; developing, which really meant adapting from research to practical applications; documenting all along the line; disseminating, meaning sharing information with others; and then *diffusion*. A key point in the book is that both dissemination and diffusion need to be thought of from the user's point of view. It is more common when you have a project to write it up in terms of your own experience, thinking about yourselves rather than the potential users. There is much emphasis in our book in finding out about the ultimate client. The other recent literature indicates there have been many more adoptions than adaptations. It is one thing to choose to use something, then the developers can say "We have been successful, they have chosen our thing!" But how they actually use it is another matter and I think that's the next thing for the Cluster to worry about. My bias is that "technical assistance" is the vehicle for studying the diffusion problem. It is a matter of studying intervention versus institutionalization, to use two popular words.

Projects are expected to institutionalize their innovations. By and large the projects that are reported in our book started out with the notion that they would take knowledge, (research findings, successful products, or some other kind of wisdom) and adapt it to a specific application. Most of us learned that we should have started in a different place, i.e., with the target school to see what they need and what they are ready for and *then* look for an appropriate source of wisdom. But most of us started out with a thing that we were "turned on" about or that *we* wanted to do and then we went out to find a school where we could lay our egg.

Finding out what the school is ready for and what they are willing to do is different from a formal needs assessment. You don't find out what you need to know by circulating an instrument. You probably have to go out there and mingle with the troops to find out what a school is ready to do. There is going to be more time to do this in five year projects.

Another consequence of the guidelines for research adaptation projects was that we were further down the R & D line than regional laboratories who were mainly interested in development and much farther down the line than most universities where people are excited about research possibilities but don't care too much about applying the results in the practical world. Some conclusions that are borne out by our own case studies and also by the other literature which has been referred to are the following. First, begin with the client's situation. That applies to the Florida Assessment and Diffusion System (FADS) and to the PETC system for consultants also. Some of the studies like the RAND one and the SRI one indicate that before you go out to help somebody with something you should have enough experience with that thing yourself so that you are credible (at least five years experience, some say). Sometimes we have gone out to help schools with problems when we don't have sufficient experience; that was true in our project. We wanted to help school districts cope with a state mandate to have competency-based graduation requirements. People would ask, "Do you know any place that has done the kind of thing that you are recommending?" We had to say "No, we are not that far along. It will be a few years before we know all the implications." Busy school people are not too excited about spending much more time with you when you have admitted you don't have a confident answer to the problem that is bothering them. Another common finding is that you have to adapt to specific situations, even if you have something that has worked well in several other places. Each additional case is potentially a brand new ball game so you need to be prepared to adapt what you already know to a novel situation.

Another finding reported in the literature is inherent in what projects within the Research Cluster have done in the past. Almost any intervention with a school affects the whole social system of that school. Compare it to an amoeba. You can't poke an amoeba without affecting the whole organism. That is also true in schools. You don't just go in and establish a flexible schedule; suddenly you find you are involved with the administration, the politics, the teachers' organization, and a parent protest group. Another interesting observation is that the school and the community are only loosely coupled which makes it very difficult to deal with both of those groups simultaneously. Yet Teacher Corps requires that you do both. Compare it with dealing with B. F. Goodrich and the Ford Motor Company. They are not loosely coupled, so it is pretty clear how you would deal with both of those organizations simultaneously. Dealing with a tightly organized school and a loosely organized community is a different kind of venture which varies from place to place. Some community groups are pretty well organized already so you need to be prepared to cope with the existing pressure groups. Other communities won't have such a visible organization.

Another fact is that there are weak incentives for the school staffs built into Teacher Corps projects. When school faculties ask the question, "Why should we bother with that?", it is hard to come up with an answer. You can't say, "You should participate because it's going to make me world famous when I write it up after it's all over." Regulations have prevented paying them for their time during the school year so it has been hard to find strong incentives for school staff to become involved in projects. The literature indicates that having a larger role for parents is a promising trend. That has possibilities, but it also has pitfalls. Get a lot of parents interested in what is happening at a school and it may not all turn out to be positive support. Another truth that the literature points out is that lots of personal contact is needed. You can't stay in your ivory tower and expect to intervene in a target school. It has been pointed out that much lies between formal adoption and actual implementation and that there is need for modification in the light of locally perceived needs. Our book, The Five Dimensions, has one more dimension than even an Einstein could handle. We now have four (4) I's which is one more than three (3) Cyclops could handle. These I's are Initiation, Incorporation, Implementation and Institutionalization. Our experience with initiation indicates that school districts don't, by and large, seek imports from outside. It is hard to find a school district representative saying, "We have been looking all over the country for a project like yours to install." They tend to respond to local pressures rather than outside goodies. The adoption of somebody else's successful project does not necessarily lead to the same student outcomes in a new district because the program is going to be shaped locally no matter how you approach it. It is clear from the case studies in our book, The 5 D's, that localities vary a great deal in what they are ready and willing to do. The decision to adopt something has to be made by the school, not for the school, and that means the decision can't be made just in the central office. Nor can it be made just by the principal of the school. It has got to be the school, at least the teachers and probably the supporting community members who make the decision to adopt something new. The intervention, whatever it is, needs to be known by all those people, and they need to have some sense that it is being evaluated and that results can be shown. So much for Initiation. Under Incorporation, let's include giving organized assistance, i.e., incorporating your efforts with those of the target group. Teachers and administrators need to understand the underlying philosophy or rationale of your intervention. They need to know what that process will be which probably means that you will have to provide training, and you can't just train people in program content; training in how to manage the system is also necessary. Another thing about Incorporation is the need for linkage systems, and in my view those are getting broader all the time for TC projects. It used to be that you could get along if you had good contacts in the district and with the cooperating college or university. That meant two bureaucracies to cope with. Now we must also cope with the state department of education, teacher organizations and if you are there for five years I would add political candidates, trade unions, and a host of other special interest groups who might become interested.

One of the case studies in our book describes delivering all of the instruction at the school site, transporting a whole masters' degree program from an institution out into the local setting. If you are going to do that then you had better have practical activities in the instruction. When you deliver training on teachers' home ground you find that they are not excited about theoretical presentations and the reading of textbooks. And you need frequent and regular meetings. Many of us learned that you need to provide for local material development. Even if you have packaged material that is superior you should assume that it may need to be repackaged for local use. To achieve Institutionalization, "tailoring to fit" is an apt phrase. Another truth that has been learned is that Institutionalization can't be bought. A number of federally funded programs have demonstrated this, that once the funding is gone the intervention seems to disappear. This is an important future target. The scope and the nature of the intervention affect whether it is going to be diffused or not. Scope refers to short range or long range. If the nature of a project is process oriented rather than product oriented then it is more difficult to do. It is fairly easy to leave a set of books in a school district and rather difficult to get all the teachers in a school to behave in a new way. If something is going to be institutionalized at the end of the project, then it is best initiated with strong local support at the beginning. It is difficult to build that support during the project in order to guarantee institutionalization.

My conclusions have to do with technical assistance which I think is a worthwhile topic for the research adaptation cluster to be thinking about this year. I see several kinds. Projects are already involved in giving technical assistance to the target school. That is the name of the game. It isn't so common for schools to give technical assistance to projects. We are experimenting with that in our own local project and so far we have found more instances where we think we could give technical assistance to school people than we have found where school people can give technical assistance either to the project or to the university. And yet all the school people know that they have better answers for the university than the university is currently using. It is a problem to figure out how to use that willingly. Another kind of technical assistance, I think this cluster has demonstrated better than any other organization and that is technical assistance from projects to projects. There are a number of people in our group who feel that in past years they have gotten ideas from other projects that were useful to them simply as the result of meeting regularly and interacting with each other. There are also projects which call each other on the telephone to ask advice on ways of doing things. There are other kinds of technical assistance that already exist in TC and these have been of some concern to the task force which is preparing a position paper. "Networks" are expected to provide technical assistance to projects. So are "Clusters", "Loops", "Frames", and "Whirlie gigs" for all I know. There are a number of formal organizations in Teacher Corps that are there partly at least to give technical assistance. Project specialists give technical assistance, the Site Specific Orientation Program (SSOP) was designed to give technical assistance to new projects. The national conference provides some sessions that could be regarded as technical assistance. Another kind that projects have used in the past comes from consultants and both FADS, and PETC, are systematic approaches to consultative assistance. One thing is quite clear from TC Washington, there won't be any technical assistance in year zero or in year

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minus one when folks are getting together to plan a proposal. The only technical assistance provided for proposal writers will be the regulations and the legislation. Now it is not yet clear what kind of technical assistance people can get during the first year. One of our groups is going to speculate about that at this conference. What do you do with a year of planning? What kind of help might you need? One thing that puzzles me is that in order to get funded it seems reasonable to assume that you will need a proposal which shows that you have already done some careful planning. If the proposal is good enough you are granted another year to plan. And wouldn't it be ironic if you planned something entirely different than you had proposed?

I want to conclude by suggesting caricatures of several types of technical assistance. One kind is built around the super star system. One illustration is if you are designing a new school building you bring Buckminister Fuller to explain geodesic domes to the community. Then you bring Leonard Bernstein to conduct the New York Philharmonic in the new dome that you have constructed. The next logical step might be to bring John Dean to explain what security measures that you should take with your new building. Another type can be called the umbrella salesman. He comes out as a technical assistance person to find out what kind of problems you have, and no matter what they are it turns out that you need umbrellas. Furthermore, he happens to have a whole truck load of umbrellas that he parked outside when he came in to talk to you. You may doubt that such people exist in education, but at our university we have a variety of educational umbrellas available. Another group of consultants can be characterized as warm bath specialists. They get you all into a nice warm tub and you hold hands with each other and feel so good about everything that you solve your own problems. Now that I have ridiculed that notion, let me point out that we had a warm bather come into our project when we needed somebody from outside. Even though we have folks in our project who sometimes go out as consultants to do this sort of work, you can't do it for yourself. You need somebody who is more objective and thereby able to understand all the individual agendas that are being played out. So he got us to solve our own problems, one of which turned out to be me. There is another category. Let's call them the "just folks" consultants. These folks always talk to you like they were Will Rogers so you really tell them all your problems. They mosey around your project and chat. Then before they leave they very subtly give you some sage advice, in a way you can tolerate.

Finally, my favorite project directors are named Orval and Wilbur. If they proposed to build a flying machine and got Teacher Corps funding to do it, Washington would send a specialist out to see the flying machine and Lo and Behold! It really flies. They would say, "But will it work under water? That is one of the thirteen (13) criteria that we have. Furthermore, how is it at climbing trees?"

TASK FORCE ON PROGRAM EVALUATION

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I / OVERVIEW

The Teacher Corps is embarking on a significant new effort to expand programs of teacher training and retraining, and to improve the educational opportunities of low-income children through a set of five-year projects. Teacher Corps is identified in its new legislation as a demonstration program, which means that it has the responsibility to influence programs of teacher training and retraining across the nation through the dissemination and institutionalization of innovations from funded Teacher Corps projects. The Task Force on Evaluation has developed an evaluation design which meets the need for a dynamic and useful evaluation of such Teacher Corps efforts. While the evaluation could serve many audiences, the design focuses on Teacher Corps/Washington as the primary audience.

Based on an analysis of previous Teacher Corps evaluations, the following desirable evaluation design characteristics were identified:

1. The evaluation efforts should be jointly undertaken by Teacher Corps/Washington and the Office of Planning, Budget, and Evaluation, U.S. Office of Education.
2. The evaluation efforts should be an on-going process, rather than single-shot efforts.
3. The evaluation effort should be responsive to new evaluation needs as they emerge.
4. The evaluation effort should provide an on-going data collection which emphasizes documentation and qualitative (as well as quantative) data.
5. The evaluation effort should provide immediate feedback to Teacher Corps/Washington and local projects so that they can effectively utilize the evaluation data.
6. A democratic approach should be taken to the evaluation's design, data gathering, data processing, and interpretation.

7. The evaluation effort should facilitate a high level of utilization by Teacher Corps/Washington and local projects.
8. The evaluation efforts should respect confidentiality.
9. Before their wide dissemination, evaluation findings should be shared with and critiqued by appropriate professionals.

These characteristics are incorporated into the evaluation design. Fox[1] has provided a careful critique of these premises.

The proposed evaluation design meets the needs for four types of evaluation efforts. First, there is the need for local project evaluation which aids program improvement at the local site. All Teacher Corps projects are required to ". . . document all significant factors which influence project experience and results" in order to "review progress in accomplishing the objectives developed in the original proposal and revise those objectives, if necessary" (172.53). This evaluation design describes technical assistance efforts and funding required to support the local evaluation effort. It is also proposed that Teacher Corps/Washington take an active role in prescribing evaluation design parameters and developing exemplary material for these local efforts.

The second evaluation need is for a cross-site formative evaluation that would obtain baseline and time-series measurement of both project processes and Teacher Corps outcomes. The national-level formative evaluation would identify relationships and provide these insights, on a timely basis, to Teacher Corps/Washington.

The third need is for focused, theory-based studies on specific project experiences and areas of endeavor which represent priority problem areas for the success of Teacher Corps efforts. This important dimension of the evaluation effort would greatly increase our understanding of these priority problem areas; it would also provide insights and assessment procedures which would be used by broader evaluation efforts, such as the cross-site process/outcome evaluation. Finally, there is the need for a summative evaluation which would integrate and interpret data available from local sites and other evaluative efforts. The purpose of the summative evaluation would be to answer policy questions relevant to Teacher Corps, other federal agencies, and the broader teaching profession.

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[1] G. Thomas Fox, Limitations of a Standard Perspective on Program Evaluation: The Example of Ten Years of Teacher Corps Evaluations. Madison: The University of Wisconsin--Madison, 1977.

The proposed evaluation design has four components:

1. A Local Project Documentation and Evaluation Component featuring a locally controlled documentation and evaluation effort which would aid local program development.
2. A National Process-Outcome Assessment featuring cross-site analysis of process and outcomes, and conducted by an independent evaluator.
3. A series of Special Project Studies which are theory-based studies of priority project dimensions.
4. A Summative/Synthesis Evaluation, which is a secondary analysis of quantative and qualitative data, and which addresses broad policy questions related to Teacher Corps.

The evaluation design emphasizes the interrelationships among and between these four components and describes a series of mechanisms for establishing and maintaining those interrelationships. The evaluation design features an innovative governance approach which integrates the four substantive components of the evaluation. The Task Force proposes the creation of a Reaction Panel (REAP), which would be representative of Teacher Corps role groups as well as evaluation experts drawn from the broader professional community. The panel would advise Teacher Corps/Washington and the Office of Planning, Budget, and Evaluation on a variety of policy and procedural questions concerning the design, data collection, data analysis, and utilization of the proposed evaluation efforts. The Reaction Panel would have the following characteristics:

1. It would serve as an advisory group, rather than a decision-making board or council.
2. It would be broadly representative of evaluation expertise and the Teacher Corps practitioner community.
3. It would have a maximum of ten members.
4. Appointment to the advisory group would be for an indefinite and lengthy term.
5. It would hold regularly scheduled meetings.
6. It would receive staff assistance from Teacher Corps Washington.

The Reaction Panel would be responsible to both the Office of Planning, Budget, and Evaluation and Teacher Corps/Washington; under the proposed evaluation design, those two agencies would have joint ownership of the evaluation effort. The National Process-Outcome Assessment described above would be funded through the Office of Planning, Budget, and Evaluation, while the other proposed evaluation components would be funded directly by Teacher Corps/Washington.

The evaluation design described in this Task Force report will have a number of benefits beyond those suggested by the evaluation design characteristics described above. First, the evaluation will facilitate fundamental and important insights about institutional reform, teacher training, and related issues. Second, it will provide a rich documentation of Teacher Corps activities featuring both within-site and cross-site perspectives. Third, it will provide a conceptual framework and set of validated data collection procedures and materials. These new substantive insights and measurement approaches will constitute a major contribution to American education--a contribution we believe can be similar to that made by the eight-year study of the 1930's and 1940's.

Issues Addressed

The Task Force on Evaluation had three two-day meetings during which a broad set of issues concerning the proposed evaluation design were identified and addressed. These issues represent a conceptual framework for viewing the proposed evaluation design and its potential alternatives. A description of these issues is presented in Appendix A.

The rest of this report is divided into four chapters. Chapter II is a presentation of the components of the evaluation and identifies the purposes and design for each component. Chapter III is an examination of the substantive framework for the evaluation and relates that framework to the four components described above. Chapter IV presents the proposed governance and collaborative mechanisms, as well as their rationale and characteristics. Finally, Chapter V illustrates some developmental tasks which Teacher Corps/Washington should undertake in the near future if this design is determined to be suited to the needs of the program.

II / COMPONENTS

Overview

The evaluation design has four components, or types of studies. The four components of the evaluation are as follows:

1. A Local Project Documentation and Evaluation Component featuring a locally controlled documentation and evaluation effort to aid local program development.
2. A National Process-Outcome Assessment featuring cross-site analysis of process and impact conducted by an outside evaluator.
3. A series of Special Project Studies which are theory-based studies of project dimension which have high priority.
4. A Summary/Synthesis Evaluation, which is a secondary analysis of quantitative and qualitative data, and which addresses broad policy questions related to Teacher Corps.

These four components are closely interrelated in several ways. First, they are designed to provide complementary data related to important dimensions of the Teacher Corps efforts. Second, their purposes are complementary. For example, the local project evaluation is designed primarily to help local program development, while the National Process-Outcome Assessment provides a cross-site evaluation designed primarily as a national formative evaluation. Finally, several approaches have been included to ensure that the various evaluations are properly synthesized and utilized.

Although these four types of studies are closely related, the Task Force felt that four somewhat separate components were needed. There were numerous reasons for that position. First, it would not be desirable for an independent evaluator to provide the local evaluation which is designed to improve local programs--an evaluation which is required in the Teacher Corps Guidelines. On the other hand, an independent evaluator is needed to conceptualize and coordinate the cross-site evaluation. The majority of the Task Force members rejected the idea that this conceptualization and coordination could be carried out by local evaluator/documentators.

The expertise of specialized researchers is also needed for the extremely important Special Project Studies. These researchers should serve as principal investigators of separate research efforts in order to obtain quality, in-depth studies. Moreover, this approach will help to ensure that a variety of conceptual frameworks are used. Subordinating these research efforts with the National Process-Impact Assessment, for example, might reduce the role of the specialized researchers to that of outside consultants and might thus narrow the range of conceptual frameworks used.

Finally, a fresh synthesis or summary of the findings from the various evaluation efforts is needed. This fresh synthesis should also use other data, such as project proposals and final reports, and provide this synthesis on a continual basis. A separate group, under the direction of Teacher Corps/Washington, should carry out this synthesis.

Local Program Documentation and Evaluation Component

The primary purpose of the local program documentation and evaluation is to aid local program development. The goals for this component are as follows:

1. To provide documentation and formative evaluation which aids local project improvement.
2. To cooperate with the National Process-Outcome Assessment in order to facilitate the national evaluation of Teacher Corps projects.
3. To make data from local sites available to the National Data Bank (to be described later in this report).

While the primary purpose of the local documentation and evaluation component is to aid local program development, the cooperation of the local project evaluator/documentator is needed to facilitate the National Process-Outcome Assessment. This cooperation will not be a misuse of time or energy for the local project because the National Process-Outcome Study will be helpful to projects in several ways.

Local program documentation and evaluation are mandated in the Teacher Corps/Washington Program Guidelines for Program 78 projects,[1] as follows:

s172.53 Documentation of project experience.

(a) Each project must include documentation of all significant factors which influence project experience and results, including:

(1) The characteristics and condition of the local setting; and

(2) The usefulness of project processes, practices, and project schools.

The guidelines also state that documentation must be used to:

1. Review progress in accomplishing the objectives developed in the original proposal; and
2. Revise those objectives, if necessary.

Each project is obligated to carry out this documentation and evaluation. To support and enhance local project documentation and evaluation, the Task Force is proposing that several forms of technical assistance be provided. First, Teacher Corps/Washington should support the development of a quality documentation framework and process which local projects could adapt to their needs. Second, it should see that training be given to local project evaluator/documentors on the use of this framework, as well as the improvement of their own framework. Finally, Teacher Corps/Washington should carefully monitor local projects to see that local documentation and evaluation are carried out.

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[1] Some readers may not be familiar with the fact that Program 78 projects are Teacher Corps projects which begin their five-year funding in 1978.

It is important that local projects (including the community components) feel some ownership and commitment to the local program documentation and evaluation. Ownership will result when local projects are able to use the documentation and evaluation as part of the inquiry process carried out by the project staff and members of cooperating institutions and the community. Ownership is also strengthened when a broad spectrum of local participants helps to identify necessary information, data collection processes, and procedures for utilizing this information. The local program documentation and evaluation ought to strengthen the capacity of local institutions and community members to conduct ongoing documentation, evaluation, and inquiry, even after the project has terminated. Finally, project participants will feel ownership of the documentation and evaluation process when it proves to be helpful in improving program activities. Each project should thus be required to develop criteria for project success and a plan for how the local documentation and evaluation component will achieve these results. National technical assistance would aid the development and implementation of such a plan.

The core of the local program evaluation should be a rich documentation of project processes and outcomes. While the documentation would be greatly enhanced by a specified initial documentation framework, it is also important that there be flexibility in the documentation design, so that the documentation can remain closely matched with important program features. As the project unfolds, efforts must be made to ensure the delicate balance between prestructured documentation and flexibly structured documentation which can track unforeseen--but critical--dimensions of the project. The last chapter of this report proposes the development, over the next six months, of an initial documentation framework and process. That chapter also proposes an approach to training local project documentators in this framework and process.

Once the documentation is under way at local projects, additional technical assistance will be needed. To meet this need, regional networks of projects ought to be established to facilitate better documentation. Such networks would provide an opportunity for local evaluator/documentators to share their results and working procedures and processes. In this way, generalizations about developmental processes across sites can be generated. In addition, the regional networks would be a vehicle for providing technical assistance to local projects. It is not always necessary that technical assistance come from outside the staff of various projects. Instead, peer assistance and cooperation, along with the effective utilization of outside consultants, should be undertaken.

Finally, it is important that the local project evaluator/documentators work closely with the National Process-Outcome Assessment efforts. That would enable local projects to utilize the conceptual frameworks, questions, and data collection processes developed jointly with the National Process-Outcome Assessment. Moreover, local projects could use the results of the National Process-Outcome Assessment to understand themselves in comparison with other projects across the country.

In turn, the National Process-Outcome Assessment can benefit from local documentation which will provide insights concerning important project variables. The National Process-Outcome Assessment needs access to (and credibility at) the local project as well as assistance in collecting data at each of the local sites. It is expected that the local evaluator/documentor can help provide such support. The national study also needs assistance in interpreting the findings of the National Process-Outcome Assessments which the local evaluator/

documentors would provide. Local evaluator/documentors would also be helpful in facilitating the utilization of the national findings, both at the local site, and within the Washington office.

The Task Force feels that cooperation between the local project and the National Process-Outcome Assessment is essential to the success of the entire evaluation effort. Cooperation should be built on a set of mutual benefits, as described above, as well as on a mechanism for conflict resolution. The Reaction Panel and Teacher Corps/Washington should help to facilitate such cooperation, as will be explained in the chapter on Governance and Collaboration.

National Process-Outcome Assessment

The second component of the overall evaluation design is a National Process-Outcome Assessment. The goals of this effort are:

1. To describe local project impact in terms of the nine major outcomes of Teacher Corps programs, using common cross-site measures in a time-series perspective.
2. To describe and document local project contexts, structures, and processes by a set of common measures in a time-series perspective.
3. Within financial constraints, to obtain an in-depth assessment of process and outcome indicators at a sample of projects and to incorporate these insights within the broader analysis of process and impact as indicated in Goal 4.
4. To examine relationships among Goals 1, 2, and 3, with emphasis on providing policy and operational implications for Teacher Corps/Washington and local projects.
5. To document and assess the process and impact of technical assistance and other Teacher Corps/Washington interaction with the field, and to determine the relationship of these efforts to successful or unsuccessful project implementation.
6. To create and maintain a National Data Bank of both qualitative and quantitative data about Teacher Corps/Washington, technical assistance efforts, local project structures and processes, and project impact.

7. To demonstrate a useful new approach to evaluation, emphasizing:
   - (a) More thorough documentation, as well as evaluation of local projects;
   - (b) More effective collaboration between Teacher/Corps Washington, local projects, OPBE, and outside evaluators; and
   - (c) More effective utilization of documentation, evaluation, and data bank efforts as a vehicle for national Teacher Corps and local project improvement.

It is anticipated that OPBE would prepare an RFP for external bid on the National Process-Outcome Assessment. The independent contractor could be either a university education laboratory or center, or a private contractor. However, use of Teacher Corps funds may restrict the independent contractor to either a state education agency, a university, or a local education agency.

A number of features of the national-level evaluation design are implied by the goals for the National Process-Outcome Assessment described above. The evaluation should be of sufficient duration to allow the independent evaluator to understand not only project processes and impact, but also the level of institutionalization of project-generated innovations. The Task Force recommends that the study be an eight-year study. This would allow the evaluator to examine Program 78 projects throughout the five years of their existence and, further, to examine the pattern of institutionalization of these innovations following project termination. Since institutionalized innovations tend to fade over time, it is important that the study of institutionalization continue for at least two years following the end of Program 78.

The eight-year duration of the outside evaluation would allow the independent evaluator also to study a sample of Program 79 projects. This evaluation would provide a validation and clarification of process-outcome relationships established in the study of Program 78 projects. It would also help to assess the changes which Teacher Corps/Washington instituted in Program 79 projects or in technical assistance to those projects.

In any case, the independent evaluators should not set forth a narrow definition in framework as to what constitutes each of the nine major outcomes. Instead, the initial baseline data should represent a pluralistic conception of these outcomes. It is important that the Reaction Panel, with outside staff help, provide a basic frame for the description/definition of each outcome, so as to lend the evaluation consistency and the potential for generic generalizations. However, it is also important that the Reaction Panel and independent evaluator utilize information which evolves from project sites and their own data collection efforts to clarify and expand the meaning of these nine outcomes. As is explained in Chapter III, the subtantive framework needs further attention over the next few months.

Assessing the extent of change in institutions in terms of the nine major outcomes is difficult to accomplish, as it is the problem of isolating and attributing changes to Teacher Corps, rather than to other sources of change. Teacher Corps projects are complex institutions in themselves and are not easily studied by classic experimental designs. This, of course, is not to say that important insights cannot be gained by the evaluation of Teacher Corps projects.

Time-Series Analysis and Comparison Groups. Two perspectives are needed for viewing changes in existing institutions in terms of the nine major outcomes of Teacher Corps projects. One perspective for viewing changes in existing institutions and in Teacher Corps projects themselves is based on data collected in a time-series analysis framework.[1] Time-series analysis allows the project to be compared against itself, as it existed at various points over time. Such analysis also helps to capture trends which are often lost when a pre/post test design is utilized. Moreover, a time-series analysis allows for frequent data analysis and feedback, so as to aid Teacher Corps/Washington and local program improvement. The Task Force recommends that time-series analysis be utilized, but that such an approach vary the time frame used for each program component. The time-series analysis should include data collection at no less than two-year intervals for any program component, and should be conducted for a period of no less than four years and not more than eight years. At critical points in the project's development, it may be important to collect data on a monthly or quarterly basis. For example, school climate might be assessed once the first year and twice each subsequent project year, whereas institutionalization might be assessed less frequently.

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[1] G. Thomas Fox, Leo W. Anglin, and Thomas A. Romberg, "Reflections upon the Use of Time-Series Design and Analysis for Program Evaluation." Paper presented at the April, 1977, meeting of the American Educational Research Association, New York, N.Y.

A second perspective on changes in Teacher Corps--and in existing institutions--is possible through the utilization of a comparison group of non-Teacher Corps schools. The use of such a comparison group should be limited to the study of school climate and the development of an education personnel development system. The comparison group could be made up of schools within the Teacher Corps-serviced school districts which serve the same type of child as the Teacher Corps project.

The purpose of the comparison would not be to prove the efficacy of Teacher Corps, but rather to help eliminate some explanations as to why Teacher Corps did or did not make a difference. In general, the research design will not allow for definitive proof of the efficacy of Teacher Corps, nor is this a desirable goal. Instead, the National Process-Outcome Assessment will help to document the processes and outcomes of Teacher Corps and to examine some of the relationships between those processes and outcomes.

The National Process-Outcome Assessment would be an evaluation of the Teacher Corps program at local sites, not an evaluation of personnel trained by the program. This point is made to counter any thought that teachers are to be evaluated in terms of how effective they are as teachers. Data may be gathered about teachers and their teaching, but this would be done in order to assess the teacher training program, not the teacher. For example, it is entirely possible that some Teacher Corps projects encourage teachers to adopt teaching behaviors and styles which lead them to be less effective with children. In this case, the project, rather than the teacher, would be responsible for decreased effectiveness.

The National Process-Outcome Assessment ought to give considerable emphasis to the role which the community plays in both project governance and teacher training. Since community collaboration is a major goal of Teacher Corps, the evaluation ought to both document and evaluate collaboration with communities. It will be important for the independent evaluator, with advice from Teacher Corps/Washington and the Reaction Panel, to develop appropriate procedures for studying community collaboration.

A related concern is the extent to which pupil achievement data would be used to assess Teacher Corps projects. One approach to that concern would be to utilize pupil data related to pupil achievement goals which were locally defined. There are several serious problems with this approach. First, it is unlikely that local projects would have the sophistication in measurement to acquire this data. It would also be extremely difficult for local projects to develop a research design which would control for other school factors which influence achievement scores. Consequently, the use of pupil achievement data based on a local definition of gain is not recommended.

A strictly national definition of pupil achievement would also not be desirable. Variations in the goals of inservice training programs will vary widely across projects. This would raise a serious problem in the "program fairness" of an evaluation which related inservice training to narrowly defined pupil achievement scores. Moreover, a national evaluation would also experience great difficulties in developing a clean research design, given the overlap of local influences upon pupil achievement. A third approach would be to identify and study clusters of projects which have similar inservice training goals and pupil achievement goals. While it is difficult to make a definitive recommendation about pupil achievement as evaluation project indicators at this time, it is likely that this third approach may be the most desirable, should pupil achievement scores be utilized as a measure of project effectiveness.

In-Depth Assessment of Processes and Outcomes. The third goal for the National Process-Outcome Assessment is to obtain an in-depth assessment of processes and outcomes at a sample project and then to incorporate these insights within the broader analysis of process and impact. The task force assumes that this would be an intensely qualitative study focused at a selective sample of approximately ten Teacher Corps projects.

The process would begin with a rich documentation using comparable categories across the ten sites. A number of useful variables and conceptual frameworks would then be evolved and incorporated into the larger study. At the same time, the National Process-Outcome Assessment would likely profit from reviewing the local documentation conducted at all the local Teacher Corps projects; insights from these documentations could then be included in the broader process and impact analysis.

The in-depth assessment would require close collaboration with local projects. It is likely that the outside evaluator would want to use local documentators to aid in the in-depth assessment.

In examining the relationships between process and outcome measures, it is important that emphasis be given to providing policy and operational implications for Teacher Corps/Washington and local projects. This in turn implies several needed characteristics for the process-outcome study. First, it is important that variables be included which can be influenced or changed by Teacher Corps/Washington or local projects. For example, it is not helpful to a local project to know that its success would be enhanced if it were located in a different geographic setting. On the other hand, it would be useful to know new ways to organize the project planning process for community involvement. This type of information might vary with the geographic setting of the project, so that rural projects are encouraged to conduct one planning process, while urban projects are encouraged to conduct another such process. Moreover, it is important for the process-impact study to answer management decisions posed by Teacher Corps/Washington or local projects. While it would not be desirable to continually adjust the evaluation on a dramatic scale, it is desirable for the evaluation to be continually responsive to emerging Teacher Corps decisions, inasmuch as that is possible within the evaluation design.

A National Data Bank. The creation and maintenance of a qualitative and quantitative data bank is of extreme importance. The data bank should house a number of important kinds of information. From the process-outcome study itself, the data bank should include concept papers, data collection instruments, completed instruments (including interview tapes and notes), and error-free computer data tapes holding data at all levels of abstraction and synthesis. From Teacher Corps/Washington, the data bank should include copies of proposals and quarterly reports from each of the projects; materials from the proposal review and the project monitoring process; and materials related to the development of the Teacher Corps legislation.

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The data bank also should include proposals for technical assistance, as well as training materials and technical assistance plans and final reports.

Next, local projects should provide a variety of useful information for the data bank. Besides the evaluation and documentation reports from local projects, it would be useful to have other project management materials, training materials, course outlines, and other primary documents, including descriptions of the community involvement process. It is important to have documentation of various local plans throughout their evolution, rather than only the final version of the plans.

The data bank would have several uses. It would be a resource center from which Teacher Corps projects could obtain examples of planning documents and training materials used in other projects. It would also provide one data base for subsequent evaluation efforts, with special emphasis upon the Summative Synthesis Evaluation to be described later in this chapter. Finally, the data bank should be available as a resource to other researchers who are interested in studying Teacher Corps.

Consequently, it is important that the information held in the data bank be properly categorized and available for immediate retrieval. One responsibility of the National Process-Outcome Assessment will be to develop a comprehensive set of categories and a data retrieval system. From time to time, usefulness of information created by the data bank must be assessed, so that the data bank can be improved.

The National Process-Outcome Assessment should assess not only local projects' processes and outcomes, but also the process and impact of technical assistance and other Teacher Corps/ Washington interaction with the field. One important feature of Teacher Corps is the high quality of its national network of cooperation and technical assistance. In some ways, Teacher Corps ought to be viewed as a national network of projects, rather than as a series of isolated individual projects. Moreover, the help given by the Teacher Corps/Washington office is an important dimension of project operations. The efficacy and nature of technical assistance and other Teacher Corps/Washington interaction could be evaluated without a great expenditure of money. This evaluation would be important because it would focus on some of the management components which are most directly able to be revised by Teacher Corps/Washington.

The NPOA as an Exemplary Evaluation. The final goal for the National Process Outcome Assessment is to demonstrate a useful new approach to the evaluation effort itself. This new approach should have several innovative features. The first such feature is a more thorough documentation, as well as evaluation, of local projects. Previous evaluations of Teacher Corps used highly quantitative and abstract analysis to the exclusion of case studies and a qualitative analysis of project dynamics. The proposed National Process-Outcome Assessment would include case studies and the use of qualitative data in the evaluation process.

Secondly, an innovative form of collaboration is needed between Teacher Corps/Washington, local projects, OPBE, and the independent evaluators. The approach to collaboration proposed for this total evaluation effort is discussed in Chapter IV of this report. Finally, better utilization of the documentation, evaluation, and data bank efforts is needed, for improvement of Teacher Corps projects both nationally and locally. One of the goals of Teacher Corps projects is to develop local leadership which is effective in facilitating accomplishment of project goals and objectives. The documentation and evaluation should strengthen local leadership and help to build an ongoing inquiry process at the local project. This process would include an ongoing ability of individuals and groups to collect, examine, and utilize information and evaluation for the improvement of program implementation, institutionalization, and dissemination. The utilization of the various evaluation efforts was also discussed in this chapter.

Special Project Studies Component

Complementing the Local Program Documentation and Evaluation and the National Process-Outcome Assessment will be a set of extremely important special studies. Those studies will provide theoretical understanding of important areas related to project implementation and institutionalization, as well as federal relationships with local projects. Outside researchers will be encouraged to develop proposals (which could be funded by Teacher Corps or other groups, based on their promise for illuminating such critical dimensions as those described above). Many members of the Task Force feel that this was the most critical component of the evaluation effort.

The goal for funding these special projects is to provide insight into local project functioning, in order to illuminate or explain findings of the local program evaluation or the national process-outcome assessment.

The emphasis within these studies will be on alternative conceptual frameworks and data collection processes, as well as the utilization of theory from related disciplines to shed light on Teacher Corps processes and results. For example, the following issues might be addressed in special project studies:

1. How does a beginning teacher get socialized into Title I schools? How can one determine which teachers will assist and succeed in Title I schools?
2. How do the governance structure and processes within projects relate to successful or less successful accomplishment of the demonstration goal of Teacher Corps?
3. How do various modes of Teacher Corps technical assistance relate to project success?

These questions are intended to suggest--but by no means exhaust--the possible areas of inquiry within special projects.

Several examples illustrate the accomplishments which might be made through a special study. Longitudinal case studies could be carried out involving interns, teachers, and other trainees over an eight-year time span. The purpose of these individual case studies would be to understand project dynamics through the experiences of individual participants, as well as to understand changes and trends in their professional career and viewpoints. A second special study might examine the organizational linkages between local institutions and effects which Teacher Corps has had upon these linkages. The study would be theory-based, using sociological, anthropological, and political science conceptions of organizations and organizational change. Each special project would emphasize an intense examination of a relatively small sample of either individuals or projects.

It is likely that university-based researchers, or those based at laboratories or centers, would be attracted to conducting such special project studies. This would allow one or several professors and graduate students to conduct the studies at relatively low cost, while also providing a theoretical and interdisciplinary perspective on these issues. Teacher Corps/Washington and the Reaction Panel would help outside researchers develop collaborative relationships with local projects, so as to minimize the cost of data collection and increase collaborative inquiry into these critical issues.

Summative Synthesis Evaluation Component

A summative synthesis for policy analysis is needed. Such a synthesis would integrate the findings and data from the local project evaluations, the National Process-Outcome Assessment, the special projects, and the National Data Bank. The summative synthesis would have several goals:

1. To provide interpretation of Teacher Corps evaluation data relative to appropriate national policy issues.
2. To examine existing data and data collection methods and to suggest improvements from the viewpoint of the summative synthesis.
3. To advise the contractor for the National Process-Outcome Assessment on the format and content of the National Data Bank.

Several integrated approaches would be used in the summative synthesis. First, there is the important need for quantitative analysis, utilizing meta-analysis techniques. It is anticipated that quantitative data will be reanalyzed to answer some of these national summative policy issues. Second, it is important to conduct a historical analysis utilizing qualitative data from local projects and all the primary documents described in the National Data Bank. Third, it is important that the Teacher Corps experience be related to the experience of other federally funded teacher education efforts, such as the urban/rural projects, the Triple T efforts, and the teacher center efforts. The goal of relating Teacher Corps efforts to other national teacher training activities would be to develop broader, more powerful generalizations of the conditions under which certain kinds of teacher education innovations are successful. Finally, it is important to capture the collective wisdom of experienced Teacher Corps project staff in the field and at the Washington office. This collective wisdom might be gathered through group discussions and individual interviews from which a synthesis of the best available clinical knowledge would be developed.

It is anticipated that the same small interdisciplinary group would conduct all four approaches to the summative synthesis under contract from Teacher Corps/Washington. This would maximize the integration of the efforts and provide Teacher Corps/Washington with a rounder, richer view of Teacher Corps activities and results. During the early years of Teacher Corps

Program 78 efforts, this group would receive only limited funding. The summative/synthesis group would work with the Reaction Panel in designing the more extensive summative/synthesis study. In part, they would determine the broad questions to be asked, the data sources available, and the policy decisions being considered which the summative/synthesis might help resolve.

As Program 78 and Program 79 projects near completion, the summative/synthesis group would receive additional funding, allowing it to intensify its quantitative and historical analysis and to capture the pool of wisdom from projects. It is anticipated that the summative/synthesis would be directed at the teacher education profession, as well as at federal policymakers.

III / SOME SUBSTANTIVE FRAMEWORKS

The Evaluation Task Force had only limited time to explore substantive frameworks appropriate for the evaluation. This chapter presents three partially developed substantive frameworks which were used by the Task Force. The Task Force strongly recommends that considerable attention be given to developing these frameworks over the next few months.

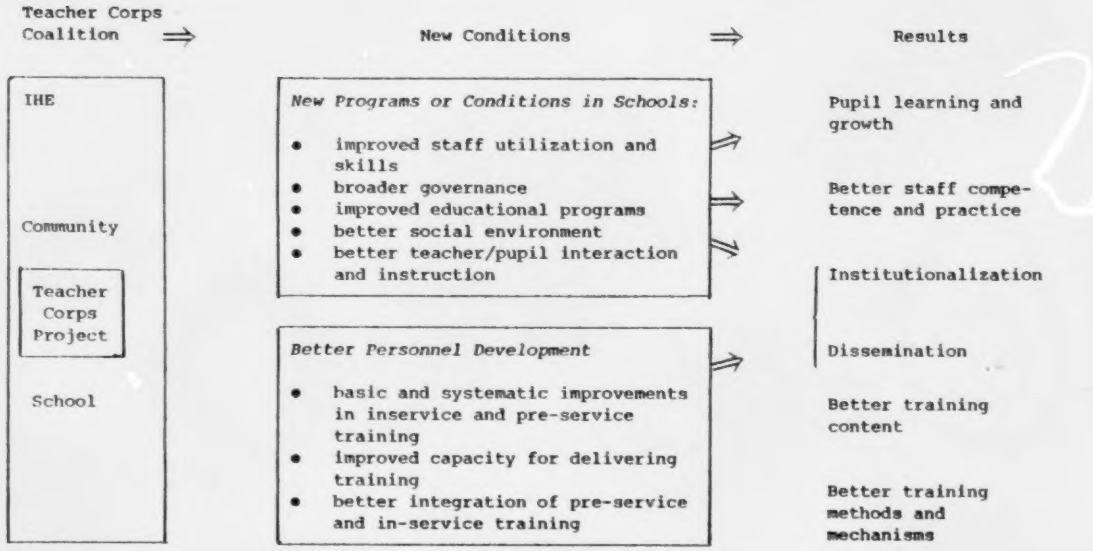
The Generic Purposes of Teacher Corps

The first type of substantive framework for Teacher Corps is based on the need for a long-range and bold view of the purposes of Teacher Corps. This substantive framework does not depend upon the interpretation of minor aspects of the Teacher Corps Guidelines. Instead, it is a conceptualization of the broader purposes of Teacher Corps and the assumed patterns of causality which lead to the achievement of these broader purposes.

An initial conceptualization of this substantive framework is presented in Figure 1. This conceptualization is based on the idea that Teacher Corps is a temporary system working in collaboration with a local university or college, a community, and the public schools. This coalition attempts to bring about new programs or conditions in schools, the universities, and the community, and to bring about better personnel development systems. In conceptualizing better programs or conditions in schools, the conceptualization emphasizes the importance of improved staff utilization and skills, a broader governance system, improved educational programs (curriculum),

FIGURE 1

The Generic Purposes of Teacher Corps


Teacher Corps Coalition
New Conditions
Results
IHE
Community
Teacher Corps Project
School
New Programs or Conditions in Schools:
improved staff utilization and skills
broader governance
improved educational programs
better social environment
better teacher/pupil interaction and instruction
Better Personnel Development
basic and systematic improvements in inservice and pre-service training
improved capacity for delivering training
better integration of pre-service and in-service training
Pupil learning and growth
Better staff competence and practice
Institutionalization
Dissemination
Better training content
Better training methods and mechanisms

a better social environment, and a better teacher/pupil interaction and instruction. This interpretation of the impact which Teacher Corps intends to have in school settings suggests that Teacher Corps intends to have a dramatic impact. In turn, these new programs or conditions in schools would influence pupil learning and growth, staff competence in practice, and institutionalization and dissemination of these new improvements.

The coalition of a university or college, a community, and the public schools--all in conjunction with Teacher Corps--will also try to influence the education personnel development system. This would include making basic and systematic improvements in inservice and preservice training, improving the capacity of both the university and the school for delivering training, and implementing better integration of preservice and inservice training. These improvements would lead to better training methods and mechanisms, better training content, and the institutionalization and dissemination of these innovations.

Refinements of this overall conceptualization would follow from the question: What broad reforms in education does Teacher Corps seek to establish and what causal relationships would lead to these reforms? Continued exploration of the generic purposes of Teacher Corps is thus needed. Such exploration would help to clarify the ultimate goals of Teacher Corps, to clarify the causal relationships leading to these goals, and to bring to bear the collective wisdom of the education profession on these important issues.

Alternate Specialized Substantive Frameworks

A second approach to viewing the substantive frameworks for the evaluation design is to examine several alternative frameworks which have a more specialized purpose. The following pages present three conceptual frameworks which can guide aspects of the substantive focus of the evaluation. In a sense, these frameworks overlap each other. In another sense, however, the emphases are quite different from each other. Consequently, a variety of frameworks may be useful in portraying desired foci for different dimensions of the evaluation.

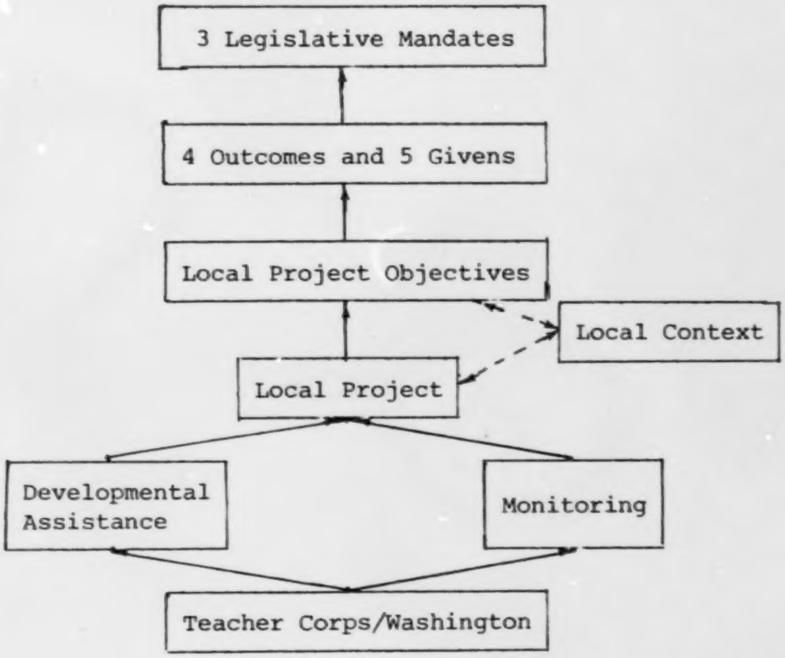
The first substantive framework portrays Teacher Corps as an articulated system for achieving its legislative mandate. In order to meet its three legislative mandates, Teacher Corps/Washington establishes a set of linkages which are reflected in the Teacher Corps Guidelines. For example, if local projects can achieve the four outcomes and five givens prescribed in the Guidelines, they would have made major advances toward helping Teacher Corps/Washington achieve its three legislative mandates. The substantive framework suggests sets of questions such as:

> What was proposed to happen and what actually happened at each level in the conceptual framework?
>
> How did the various levels influence each other? (For example, what effect did developmental assistance have on the implementation of local projects?)

How did the local context influence both the local project process and the achievement of local project objectives?

Substantive Framework No. 1

Teacher Corps as a Defined System for Achieving Its Legislative Mandate


3 Legislative Mandates
4 Outcomes and 5 Givens
Local Project Objectives
Local Context
Local Project
Developmental Assistance
Monitoring
Teacher Corps/Washington

Substantive Framework No. 2

Teacher Corps as Projects Playing Many Roles

Roles:

1. A *Federal Project* which interacts with a federal agency.
2. A *Management Effort* with staff, objectives, tasks, and budgets.
3. An *Organizational Development Process* which attempts to build communication, trust, and commitment toward goals, while resolving conflict.
4. An *Institutional Change/Temporary System* which must gain support or resolve conflict with existing institutions while also attempting to change those institutions.
5. A *Collaborative Decision-Making Structure* which is attempting to enfranchise the community and to build collaborative decision-making between the community, the schools, and the university.

6. A Comprehensive School-Reform Strategy which attempts to make major changes in schools through staff training, collaborative decision-making, etc.

7. An Inservice Teacher Education Innovation which attempts to develop and demonstrate creative and effective inservice programs.

8. A School Personnel Trainer which delivers training to a variety of role groups at the school, including interns.

9. An Unexamined Process and Experience which needs to be examined and clarified. Included here is the perspective that explores the process and experience through the participants' frameworks of meaning.

Substantive Framework No. 3

Teacher Corps as Many Tasks to Achieve

I. Program

Planning

Planning programs to meet needs and goals for all target groups, including Teacher Corps for 1st, 2nd, 3rd, 4th, 5th years.

Designing and using documentation/information systems to enhance planning/revision decision making.

Employing a problem-solving approach to generate solutions to identified problems and needs.

Providing leadership for engaging all invested groups (IHE, LEA, SEA, Community) in planning and coordinating activities.

Developing a more detailed budget and allocating needed resources and facilities to various program components as they evolve.

Scheduling planning activities into a master calendar to enable coordination of all planning activities among all groups.

Planning and scheduling credits, degrees, and courses for teacher-interns and teachers.

Planning, developing, and sharing newsletters for distribution within the project, district, Teacher Corps, and other interested educational agencies.

Providing help to other interested educational agencies to enable them to adopt or adapt successful programs and procedures from their project into their agencies.

Achieving basic systematic improvements in the IHE and LEA in training systems for education personnel.

Encouraging a capability in the IHE to provide training for education personnel for specified field-generated goals.

Institutionalizing successful products, processes, and practices in the IHE and LEA.

II. Personnel

Monitoring the success of Teacher Corps members, administrative staff, IHE, and LEA participants concerning their skills to carry out responsibilities.

Identifying, securing, and scheduling training and technical resources to improve the ability of the staff to carry out assigned responsibilities.

Monitoring Programs

Monitoring and documenting pertinent information about ongoing programs.

Monitoring all Teacher Corps projects as they multiply.

Evaluating/Revising Programs

Summarizing documented information about planning, developing, and implementing information.

Analyzing summarized data and providing analysis to all invested groups for decisions about continuing, modifying, or eliminating certain programs and procedures.

Revising program, the role of assigned personnel, and expectations of target groups, and/or the implementation process as prescribed by collaborating groups.

Disseminating/Diffusing Successful Programs/Procedures

Sharing information about successful ideas, programs, and processes with all invested groups.

Planning and writing technical interim reports concerning the progress made to date in the project.

Designing a better education personnel development system.

Planning broader programs of teacher education (models of preservice/inservice teacher education).

Developing/Adapting

Selecting, adapting, and/or developing programs, materials, and procedures to specifications established during the planning stages.

Field-testing and revising programs prior to full-scale implementation within the project.

Involving all invested groups somewhere in the development, field-test, decision process for programs.

Implementing Programs and Procedures

Scheduling implementation of new programs with a sensitivity to ongoing programs and responsibilities of target groups.

Monitoring, evaluating, and adjusting time assigned to provide programs, to staff providing programs, and to target groups receiving programs.

Scheduling released time for interacting personnel to identify and resolve problems as they occur.

Investigating alternative roles for project staff.

A number of assumptions about causality between levels in this framework would also need to be tested.

The second substantive framework suggests that Teacher Corps projects be viewed as a set of roles. These roles include "an organizational development process" which attempts to build communication, trust, and commitment toward goals, while resolving conflict or "an inservice teacher innovation" which attempts to develop and demonstrate creative and effective inservice programs. This framework emphasizes the use of analogies for project roles to clarify the many dimensions of the local project. For each role, a set of questions could be asked. These include:

What related literature or federal project experience helps to clarify this role?

What is the history and baseline situtation at the project for each of these roles? How and why did the project evolve along the dimension suggested by the roles? To what extent, and in what ways, are projects successful in mastering each of these roles?

The last role of projects presented in the substantive framework suggests that projects be viewed as an unexamined process and experience. This open-ended view of the project would utilize participants' frameworks of meaning in trying to understand the project.

The third substantive framework portrays Teacher Corps projects in a quite different light. It emphasizes a view of Teacher Corps as a program with many tasks. This list of tasks is taken from the first report of the Task Force on Technical Assistance. Many of these tasks suggest questions such as:

What, how, when, and by whom were the tasks carried out?

What did/should Teacher Corps/Washington have done to facilitate project success in carrying out these tasks?

What is the relationship of these tasks to broader units of success, such as the completion of the first-year plan or the development of a quality school climate at project schools?

These tasks suggest a level of management-oriented evaluation which Teacher Corps would find extremely useful.

Unpacking the Teacher Corps Guidelines

A third approach to developing a substantive framework grows out of the basic outcomes for Teacher Corps identified in the Teacher Corps Guidelines. The four basic outcomes are:

1. An improved school climate, which fosters the learning of children of low-income families.
2. An improved educational personnel development system for persons who serve, or who are preparing to serve, in schools for children of low-income families.
3. The continuation of educational improvements (including products, processes, and practices) made as a result of the project, after federal funding ends.
4. The adoption or adaptation of those educational improvements by other educational agencies and institutions.
5. The approach to the third substantive framework is to clarify and extend the meaning of each of the four basic outcomes described above.

The Teacher Corps Guidelines provide only some clarification of the concepts "school climate" and "educational personnel development systems." The Guidelines do, however, specify three to four characteristics for each concept. Every Teacher Corps project must implement those characteristics while also providing each local project the opportunity to develop other characteristics and objectives related to each of these two concepts. Figure 2 pertains to the school climate outcome. It presents three areas of teacher competence which are required in the training of all educational personnel at schools participating in Teacher Corps projects. In a sense, the Guidelines equate competence of educational personnel with school climate.

For each of the areas of required competence for educational

FIGURE 2

School Climate Outcomes

Outcome: School Climate	Goal in Legislation: An improved school climate which fosters the learning of children from low income families (s172.60)
All educational personnel at school	**School conditions**
	A. Any change identified by project including curriculum, organizational or other changes (s172.63)
B. Improvement of the competence of all educational personnel in the following areas:	B. A school with the following characteristics:
1. a) To provide education that is multicultural	1. a) Provide quality multicultural education
b) To be knowledgeable of and sensitive to the needs of diverse cultures, regardless of the pupil population served by the project	b) Reflects sensitivity to and knowledge of diverse cultures regardless of pupil population served
2. To deal with a wide range of variability in children	2. Deals effectively with a wide range of variability in children
3. a) To identify children with learning and behavioral problems	3. a) Appropriately identifies children with learning and behavioral problems
b) To diagnose the special needs of these children	b) Appropriately and creatively diagnoses the special needs of these children
c) To prescribe learning activities to meet those needs	c) Appropriately and creatively prescribes activities to meet those needs

personnel, some evaluation Task Force members identified school conditions which each of these competencies implied. For example, the first competency required of all educational personnel is to be able to provide education that is multicultural. The school condition corresponding to that competency is a climate which provides quality multi-cultural education. Consequently, the evaluation of the school climate objective could be done in terms of demonstrated competence of educational personnel, as well as an examination of characteristics of the schools in which those personnel work. Further, improvement of the competence of educational personnel in this area is assumed to lead to a school which has those characteristics. In turn, a school which provides quality multi-cultural education could be assumed to have certain influences on pupils. The task force was hesitant, however, to recommend that pupil assessment be undertaken as part of the evaluation effort.

A similar examination of the implied outcomes for the educational personnel development system concept is presented in Figure 3. Each local Teacher Corps project is encouraged to develop locally defined goals for the improvement of the education personnel development system at its site. Those goals could pertain either to the local education agency and/or the institution of higher education. In addition, however, each project is required to implement several aspects of a commonly defined education personnel development system. Both local education agencies and institutions of higher education must demonstrate "basic and systematic improvements in the methods used to train education personnel." The term "basic improvements" is interpreted to mean that the improvements are both extensive and important. The term "systematic improvements" is interpreted to mean that the improvements have been validated and tested, integrated within the broader approach to training, and institutionalized within the host institution.

In addition, institutions of higher education for each Teacher Corps project are required to develop the capacity to provide training that improves the competence of educational personnel in the following areas:

1. To provide education that is multi-cultural, and to be knowledgeable of and sensitive to the needs of diverse cultures, regardless of the pupil population served by the project.
2. To deal with a wide range of variability in children.
3. To identify children with learning and behavior problems; to diagnose the special needs of these children; and to prescribe learning activities to meet those needs.

In this context, development of the capacity of the institution is interpreted to include:

1. Demonstration of the training within the Teacher Corps project.

FIGURE 3

Educational Personnel Development System Outcomes

Outcome: Educational Personnel Development System	Goal in Legislation: An improved educational personnel development system which fosters the learning of children from low income families
Local Education Agencies (at Teacher Corps project schools)	Institution of Higher Education (the participating universities or colleges)
A. Locally defined goals for the improvement of the educational personnel development system (s172.64)	A. Locally defined goals for the improvement of the educational personnel development system (s172.64)
B. 1. Basic on-going improvements in the methods used to train educational personnel (basic = important, extensive)	B. 1. Basic on-going improvements in the methods used to train educational personnel (basic = important, extensive)
2. Systematic on-going improvements in the methods used to train educational personnel (systematic = validated, integrated, institutionalized)	2. Systematic on-going improvements in the methods used to train educational personnel (systematic = validated, integrated, institutionalized)
	3. Development of the capacity to provide training that improves the competence of educational personnel in the following areas: a) I. To provide education that is multicultural II. To be knowledgeable of and sensitive to the needs of diverse cultures, regardless of the pupil population served by the project b) To deal with a wide range of variability in children c) I. To identify children with learning and behavioral problems II. To diagnose the special needs of these children III. To prescribe learning activities to meet those needs

2. Demonstration of the training in non-Teacher Corps IHE programs.
3. Institutionalization of the training capacity.
4. Institutionalization of the training program.

These four factors are seen as necessary conditions if an institution of higher education is to be successful in developing its capacity to provide this training.

The two other basic outcomes specified in the Teacher Corps Guidelines are a continuation of educational improvements (including products, processes, and pratices) made as a result of the project after federal funding ends, and the adoption or adaptation of those educational improvements by other educational agencies and institutions. These two outcomes will not necessarily have common content across Teacher Corps projects. Consequently, several alternative evaluation strategies could be utilized. First, it would be possible to content-analyze the local project-identified institutionalization and adaptation educational improvements. This could result in identifying sets of projects which have similar goals for continuation or adaptation of their educational improvements. The effectiveness of these improvements could then be studied using evaluation strategies that depend upon a common content.

A related approach would be a content-free analysis of the continuation (as well as adoption or adaptation) of educational improvements generated by local projects. First, educational improvements could be assessed in terms of the extent to which they were institutionalized within local institutions. A local documentator/evaluator of a recent Teacher Corps project rated the extent to which project educational improvements were institutionalized within the cooperating school of education.[1] The rating was done on a scale of one to five, with the following anchor points on the scale:

5 - Extensive Institutionalization

Ownership: A department (or several departments jointly) indicate ownership of the program and are actively supporting it.

Approval: Courses/programs (as required) have been developed and completely approved by the School of Education and the University.

Funding: At least some hard money supports the innovation. Soft money supporting the innovation is external to Teacher Corps funds. All funds exceed costs, and are likely to continue for at least three years.

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[1] David D. Marsh, Innovative Teacher Training for Multi-Cultural Education: The Final Report of the Cycle X Teacher Corps Project at the University of Southern California. Los Angeles: October, 1977.

Program Operation: The innovation is part of a sizable operational effort and is likely to continue for at least three years.

Staffing: There is a stable staff who know the innovation and are likely to stay involved and committed for several years.

1 - No Institutionalization

Ownership: No department indicates an active interest in the innovation or shows an inclination to keep it going.

Approval: No courses/programs currently include the innovation and no concrete plans for such inclusion exist.

Funding: No hard money supports the innovation. No soft money, or essentially only Teacher Corps money supports the innovation. No concrete plans for funds exist.

Program Operation: The innovation currently is not being used, or used only within the Teacher Corps project. No concrete plans for its use exist.

Staffing: No staff (or staff not paid by the Teacher Corps project) operate the innovation or are part of concrete plans for its operation.

A related approach was utilized by the Rand Change Agent One Study, in which the extent to which project goals were achieved was rated by local project participants.[2] However, this approach assumes that the local project goals were to bring about institutionalization of the innovation, which would not necessarily be the case with Teacher Corps projects.

Second, it would be possible to assess each educational improvement in terms of its extensiveness and importance, as well as the degree to which it was integrated with other program efforts at the host institutions. These qualities of institutionalization mirror the concepts of "basic" and "systematic" as they were applied here to the earlier discussion of the education personnel development system. Finally, each project could be assessed in terms of the number of educational improvements which were institutionalized, especially as this number is qualified by the extent and quality of the educational improvements as described here.

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[2] Paul Berman and Milbrey McLaughlin, et al., Federal Programs Supporting Educational Change, Vol. VII: Factors Affecting Implementation and Continuation. HEW: April, 1977.

A similar approach could be undertaken to assess the extent to which adoption or adaptation of educational improvements took place. Projects could be assessed in terms of the quality and extensiveness of their efforts to help other educational institutions adopt or adapt educational improvements developed through Teacher Corps. Projects could also be assessed in terms of the success which they have had in getting other educational institutions to adopt or adapt these educational improvements.

In summary, three approaches to developing a more comprehensive substantive framework for the evaluation have been discussed. The first approach called for the extension of a generic framework for examining Teacher Corps. This framework would be developed without reference to the details of the Teacher Corps Guidelines. The framework would be a bold, long-range, and powerful view of the purposes of Teacher Corps. Second, specialized substantive frameworks are needed which would guide specific evaluation efforts. For example, a substantive framework which views Teacher Corps as a series of roles would be useful in generating directions for an in-depth documentation of Teacher Corps projects. The third substantive framework was based on a careful inspection of the Teacher Corps Guidelines and the substantive framework which these guidelines imply. The Task Force recommends that the substantive frameworks be developed further in the next few months, so as to guide the overall evaluation efforts, as well as to clarify the primary purposes of Teacher Corps.

The Evaluation Task Force feels that Teacher Corps/Washington and the Office of Planning, Budget, and Evaluation should jointly undertake the formative evaluation process. This would help to ensure that the evaluation was directly responsive to the formative evaluation needs of the Teacher Corps/ Washington Office. Joint ownership by Teacher Corps and OPBE would also ensure considerable interaction and dialogue between the Teacher Corps/Washington Office, OPBE, and the various evaluation efforts. This would lead to increased understanding of the evaluation results and a greater commitment to the evaluation efforts by the Washington office. Finally, joint ownership by Teacher Corps/Washington and OPBE would increase the likelihood that the evaluation could meet the emerging data needs at the Teacher Corps/Washington Office.

Four approaches to the governance of the evaluation effort have been considered by the Task Force. These models of governance can be summarized as follows:

1. External evaluator model. This approach would have an outside federal agency (such as the Office of Planning, Budget, and Evaluation) contract with an outside evaluator to conduct the evaluation.
2. Teacher Corps/Washington with Advisory Assistance Model. This model would give ownership directly to Teacher Corps/Washington, which in turn might utilize Teacher Corps role groups and outside experts on one or several advisory councils.
3. An Umbrella Organization with a Single Advisory Council. This model would have Teacher Corps/Washington fund an umbrella organization governed collaboratively by Teacher Corps/Washington, Teacher Corps role groups, and others.

4. An Umbrella Organization with Multiple Advisory and Governing Boards. This model is similar to Model No. 3, except that an advisory or decision-making panel would be formed for each component of the Teacher Corps evaluation.

The external evaluator model has several strengths. Data gathered under this model might have the greatest credibility for federal policy-makers outside of Teacher Corps. The technical competence of the evaluators undertaking such an approach may also be expected to be high. However, the Task Force rejected this model for several reasons. First, evaluations conducted under this model have had low rates of utilization by Teacher Corps/Washington; they also lack evaluation design flexibility because of the need to provide tight specifications for the evaluation within the original contract. Moreover, local projects often become the "object" of such an evaluation, rather than participants in it. Consequently, they also lack a sense of ownership and involvement in the evaluation process. Important involvement by the local projects in the documentation and evaluation efforts is also lost in such a model. The result is a loss of human effort and critical insight about project processes and impact. Finally, this approach is often exceedingly costly because of the high overhead rates of firms conducting independent evaluations. The proposed evaluation, however, did retain the evaluator approach so as to increase the technical quality of the evaluation. In the proposed design, the independent evaluator must work closely with the Reaction Panel.

The "Teacher Corps/Washington with Advisory Assistance" model has a number of advantages. It provides Teacher Corps/Washington with the greatest degree of direct ownership of the evaluation process. That could in turn increase utilization of evaluation findings. This approach would also provide greater flexibility in the evaluation design, so that data can be quickly collected as new evaluation needs emerge. The Task Force accepted a version of this model, as will be described below.

Several cautions need to be kept in mind for this governance model. First, the model has been revised so as to give joint ownership to OPBE and Teacher Corps/Washington. The danger is that increased collaboration will detract from, rather than enhance, the evaluation effort. Second, the responsiveness of the evaluation to the needs of Teacher Corps/Washington may hinder the long-range perspective of the evaluation. Finally, the design might give too much emphasis to qualitative data and too little attention to quantitative data.

The third governance model considered was based on the assumption that a new umbrella organization, possibly a center, would be created. The umbrella organization would have several purposes:

1. To provide a conduit for financial resources supporting the evaluation.
2. To facilitate a collaboratively defined evaluation plan and its implementation.
3. To provide intellectual leadership, both in the evaluation design and in its utilization.
4. To conduct, or at least coordinate, training of evaluators utilized by the local project.

The evaluation structure might approximate one of the previous LTI's formed by the Office of Education. It might also utilize the administrative model for the evaluation of the urban/rural project. This model may have several weaknesses, however. An increase in field ownership of the evaluation process may correspond with a lessening of ownership and involvement by Teacher Corps/Washington. Moreover, several legal constraints may lessen the flexibility of the umbrella organization. The concept of extensive collaboration and analysis, and utilization was retained from the final governance model.

The last governance model considered would increase the collaboration of Teacher Corps project role groups by involving them in the governance of each of the evaluation components. However, this might result in lessening the overall consistency and conceptual integration of the evaluation design and prove to be administratively cumbersome. The concept of involvement, found in each of the evaluation components, was retained in the final version of the governance model.

Proposed Governance Model

The proposed governance model is intimately connected with the evaluation components described in Chapter II. The Task Force firmly believes that the creative evaluation design represented by the evaluation components would not be successful without this approach to the governance and evaluation effort.

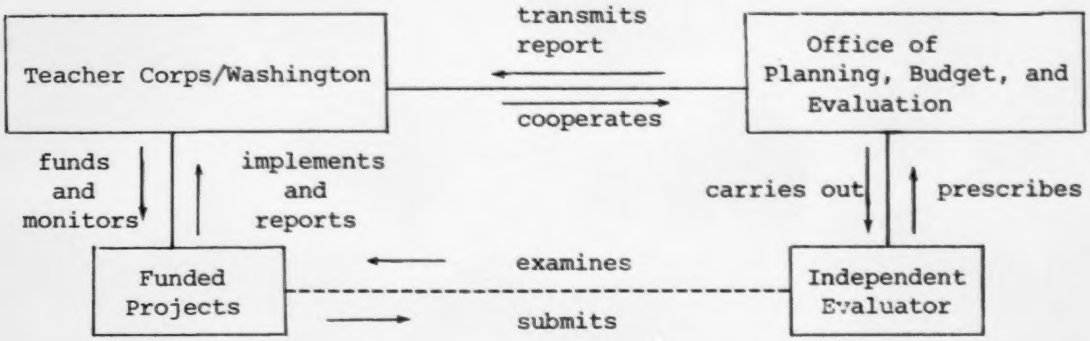
Comparison of Traditional and Proposed Governance Models. One approach to understanding the proposed governance model is to compare it with more traditional models of federal evaluation governance. The traditional and proposed models of governance are portrayed in Figure 4 . In the traditional governance model, Teacher Corps/Washington, the Office of Planning, Budget, and Evaluation, funded Teacher Corps projects, and the independent evaluator each remain separate entities. That arrangement emphasizes each entity's formal independence. In that model, the evaluation branch develops an RFP, for which Teacher Corps/Washington provides some input. The RFP prescribes a tightly defined study which is reflected in the evaluation proposal provided by the independent evaluator as a predetermined, quantitatively oriented study. The independent evaluator then examines funded Teacher Corps projects using questionnaires and interviews during short-term visits to projects. These data are then highly abstracted and submitted to quantitative analysis. Throughout the evaluation design, data collection, analysis, and interpretation phases of the evaluation, local Teacher Corps projects play a passive role.

More important than interaction between specific institutions within the traditional governance model, however, are the connotations of the overall gestalt of the traditional

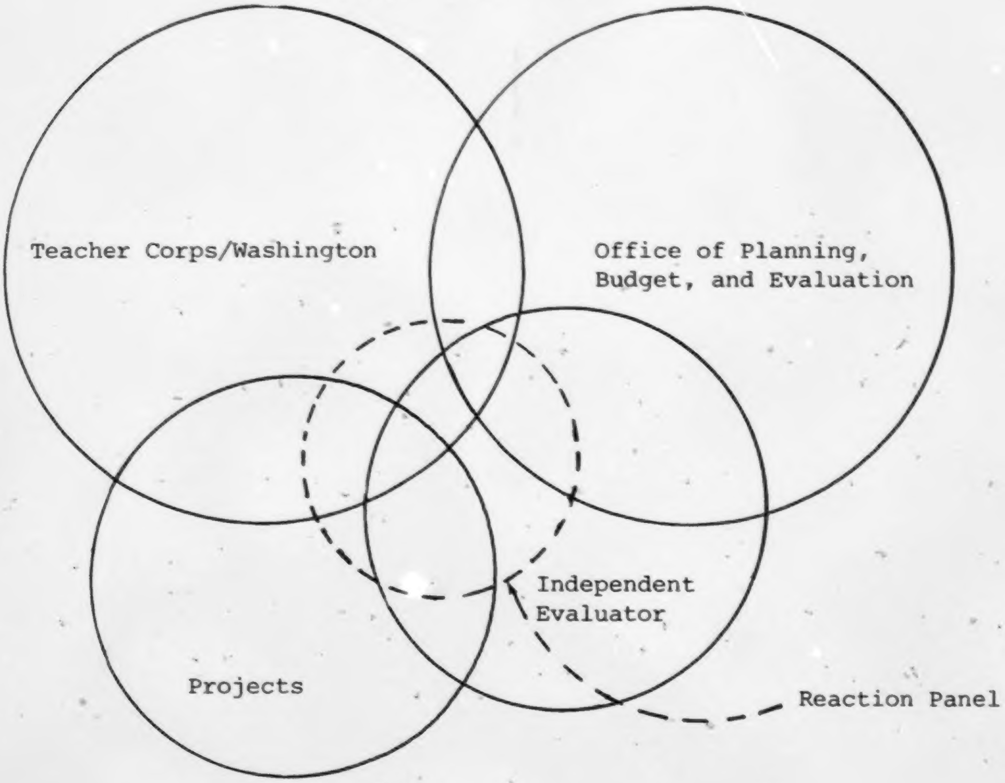
FIGURE 4

A Comparative View of the Role of Evaluation Agencies

TRADITIONAL GOVERNANCE MODEL


Teacher Corps/Washington
transmits report
cooperates
Office of Planning, Budget, and Evaluation
funds and monitors
implements and reports
carries out
prescribes
Funded Projects
examines
submits
Independent Evaluator

PROPOSED GOVERNANCE MODEL


Teacher Corps/Washington
Office of Planning, Budget, and Evaluation
Independent Evaluator
Projects
Reaction Panel

governance model, as seen in Figure 4. First, there is the notion of formal delineation of the boundaries of the respective institutions involved in the evaluation. Second, the institutions are rather formally related to each other. Even patterns of communication appear formalized in the traditional governance model. The model suggests that each institution communicates and cooperates as needed, while also emphasizing its own protection and independence.

The proposed governance model as presented in the lower portion of Figure 4 emphasizes considerably different qualities. It suggests an organic relationship between the various institutions in the evaluation study. Cooperation and collaboration are emphasized, not as distant messages between formal institutions, but instead as an integral part of overlapping program development and policy responsibilities and interests. The proposed governance model also suggests, however, that each institution is ultimately responsible for its own action, and that patterns of cooperation between institutions are clearly identified as either advisory or joint decision-making postures.

The proposed governance model emphasizes the importance of cooperation between independent and internal evaluators. For example, local project evaluator/documentors would cooperate with the independent evaluator in a joint examination of local projects, but with clearly differentiated roles. Finally, the proposed governance model emphasizes the importance of ongoing data collection and feedback throughout the life of the projects. In contrast, the traditional governance model emphasizes the transmittal of formal reports which often arrive late in the life of a local project or a Teacher Corps policy.

The Role of Teacher Corps/Washington and OPBE

Teacher Corps/Washington has several important roles to play in the proposed governance model. First, it must provide a funding commitment which helps to maintain the evaluation efforts at a quality level. Second, it must provide staff energy in evolving an evaluation design and in utilizing the results of evaluation efforts. Third, it must be willing to collaborate, not only about the evaluation effort itself, but also in the development of implications for Teacher Corps/Washington. Finally, it must emphasize and carefully monitor local program documentation efforts. If Teacher Corps/Washington does not value these local project documentations, projects will quickly sense this lack of interest. Soon afterward, projects will set aside documentation as a priority as other pressing matters demand attention.

The Office of Planning, Budget, and Evaluation (OPBE) also has an important role to play in the proposed governance model. OPBE must design the RFP for the National Process-Outcome Assessment in such a way that the independent evaluator will collect timely and useful information while working jointly with local projects in the data collection and analysis process. Second, OPBE must help the National Process-Outcome Assessment to be utilized effectively by Teacher Corps/Washington. A number of suggestions for effective utilization of this evaluation are described later in this chapter. OPBE must also help relate the National Process-Outcome Assessment to other evaluation efforts of Teacher Corps. Finally, OPBE will need to assure other federal agencies that evaluation data collected under the National Process-Outcome Assessment are seen as credible and meaningful interpretations of Teacher Corps activities and successes.

Teacher Corps/Washington and OPBE will need to develop mechanisms to carry out their joint responsibility for managing the various evaluation efforts. Joint responsibility should include coordinated funding of the evaluation efforts and a coordinated evaluation design. That will ensure that the evaluation contributes to a more meaningful understanding of the overall Teacher Corps program. There is also the need for close coordination between Teacher Corps/Washington and OPBE in facilitating the data collection efforts for the various evaluations. Finally, both OPBE and Teacher Corps/Washington will need to be involved in the effective utilization and integration of the evaluation findings.

It will be important for Teacher Corps/Washington and OPBE to hold frequent meetings. It will also be important for the OPBE project monitor to become thoroughly familiar with Teacher Corps, both at the Washington office and in the field. Finally, it will be important for both Teacher Corps/Washington and OPBE to support the proposed Reaction Panel. The Reaction Panel is clearly an advisory group accountable to and guided by Teacher Corps/Washington and OPBE.

The Need for Continued Expert Advice

The proposed governance model also includes the use of a Reaction Panel (REAP) as an integral part of the governance model. The REAP would have the following characteristics:

1. It would serve as an advisory group, rather than a decision-making board.
2. It would be broadly representative of evaluation expertise and the Teacher Corps practitioner community including community representatives.
3. It would have a maximum size of ten members.
4. Appointment to the advisory group would be for an indefinite, lengthy term.
5. It would hold regularly scheduled meetings.
6. It would receive staff assistance from Teacher Corps/Washington.

The REAP would be ultimately responsible to Teacher Corps/Washington and OPBE as an advisory group on all evaluation efforts concerning Teacher Corps. It would be clearly an advisory rather than a decision-making group, and its small size and broad representation would allow it to examine a number of issues carefully and make appropriate recommendations.

REAP and Teacher Corps/Washington. For Teacher Corps/Washington, the REAP would define substantive issues to be addressed in the evaluation. The REAP would also help Teacher Corps preserve the most useful balance between outside and inside evaluation, between qualitative and quantitative analysis, and between site-specific and cross-site analysis. The issue here is one of synthesizing the strengths of each approach which needs to be balanced.

The REAP would also help in the utilization of evaluation findings by Teacher Corps/Washington. Teacher Corps/Washington was able to use previous evaluations in a number of useful ways. The ways which previous evaluations have been utilized by Teacher Corps/Washington are presented in Figure 5. Each of these is a desirable use of evaluation and should be retained in the forthcoming evaluation effort.

The concept "school climate," which is one of nine major goals for Teacher Corps, helps to illustrate how the proposed evaluations can serve in the future. The evaluation would be helpful, first, as an aid to technical decision-making, clarifying ways in which Teacher Corps/Washington can enhance the institutionalization of school climate changes within local institutions. The evaluation would also function as a rationalizing force as it helps Teacher Corps identify decision options concerning school climate. Third, it would function as a purpose clarifier when it (a) helps Teacher Corps/Washington understand what school climate means to local projects and (b) provides a conceptual framework for examining school climate. This conceptual framework might evolve as a synthesis of local projects' concepts in combination with insights about school climate gleaned from the research literature. As the evaluator specifies indicators of various dimensions of school climate, it would help to further clarify to Teacher Corps the meaning of "school climate" itself. In short, the proposal evaluations can help in a number of ways which are analagous to those present in Figure 5.

There are a number of ways in which the REAP could facilitate the utilization of evaluation findings for Teacher Corps/Washington. First, it might organize periodic two-day sem-

FIGURE 5

Various Uses of Previous Evaluation Efforts by Teacher Corps/Washington

1. An aid to technical decision-making. Previous evaluations have helped Teacher Corps decide that certain program components needed revision, and management decisions related to the improvement of these components have been made.
2. A political asset. Several evaluations were used to show federal and congressional constituencies that Teacher Corps had heretofore been doing a superb job, as reflected in the evaluations, and should be given support for its current efforts.
3. A rationality force. Previous evaluations have encouraged Teacher Corps to identify decision options and weigh these on the basis of data.
4. A purpose clarifier. Previous evaluations have helped Teacher Corps clarify the meaning of critical concepts such as the five thrusts, and have helped to identify indicators of these concepts which not only aided data collection in the field, but also clarified the meaning of these terms within all levels of Teacher Corps efforts.
5. A respectability process. By pointing out that Teacher Corps is a heavily evaluated program, Teacher Corps gains respectability in the eyes of relevant audiences. If the Rand Corporation, for example, were conducting an evaluation, the respectability would even be greater, regardless of the technical findings of the evaluation. Who could claim that Teacher Corps was not an important educational program if a respectable evaluator found Teacher Corps at least adequate to its purposes?
6. A means for facilitating policy analysis. Evaluations have helped Teacher Corps and the Office of Education clarify and decide upon longer-range policy options in teacher education.
7. A basic research vehicle. Recent large-scale evaluations of federal education programs have constituted a large percentage of the basic research conducted in the last ten years on a number of important educational issues. This research has made a very significant contribution to the research literature in many fields of education and social science.

inars, during which evaluation findings would be discussed, with an emphasis on gaining in-depth understanding of findings. At these same meetings, the REAP could help Teacher Corps/Washington consider the policy implications of evaluation efforts. The REAP might also recommend that representatives of the independent or local project evaluations serve as resident experts at Teacher Corps/Washington to further the understanding and interpretation of these results within the Washington office. In general, a complementary set of strategies is needed to increase the utilization of evaluation efforts. These complementary strategies should include both written reports and opportunities for a variety of types of dialogue between evaluators and program managers.

REAP and Local Projects. For local projects, the REAP should provide representation and a vehicle for two-way communication between projects and other groups conducting the evaluation. It should also enhance the credibility of and cooperation with independent evaluation efforts as they seek to work with local projects.

REAP and the Independent Evaluator. The REAP could also play a critical role for the independent evaluator. It can provide the independent evaluator with better insight into project processes and outcomes, and help to clarify the substantive framework which is used in the national process-outcome study. The group could also help review instrumentations and the evaluation design. The REAP could help the independent evaluator secure greater cooperation and collaboration from local documentors, both in obtaining additional local documentation and in aiding access to outside evaluation teams as they visit local projects.

It is interesting to contrast the role implied for the independent evaluator in this governance model with the role which independent evaluators typically play. In typical federal evaluation efforts, the independent evaluator plays a highly specified and independent role. Independent evaluators are rewarded for the excellence of their technical evaluation design, but not for their ability to provide ongoing and meaningful help to the contracting institution as part of the evaluation. For example, no points are awarded during proposal review for the design which the independent evaluator may develop to help the contracting institution better utilize evaluation findings.

Independent evaluators also typically see themselves as victims of federal policies. They often feel they must compromise their technical evaluation excellence to evaluate an unwieldy federal program.

For the proposed evaluation effort, it would be useful to require independent evaluators to include in their original proposals a plan for effective utilization of their findings and conceptual frameworks by Teacher Corps/Washington. Such a plan should be given considerable weight when judging which evaluator to fund. It also would be useful if a member of the REAP served as a reader of these proposals.

Once the evaluation is funded, it would be useful to hold the independent evaluator accountable for providing a formative evaluation which would be useful to Teacher Corps/Washington. Additionally, it would be useful to secure an independent evaluator with a commitment to the concept which Teacher Corps/Washington proposes, but who can also remain independent in judging the success level at which these concepts are attained.

REAP as a Facilitative Process. The REAP need not provide all the assistance described here itself. Instead, it should view itself as a facilitative body, a group which provides process links between various cooperating institutions. For example, it should facilitate strategies for promoting cooperation and collaboration between local Teacher Corps projects and the independent evaluator, or among local Teacher Corps projects themselves. This latter cooperation might take the form of regional networks of projects, as described earlier. The REAP should also facilitate communication and collaboration between the evaluator, Teacher Corps/Washington, and OPBE. The ways in which REAP can facilitate the utilization of the evaluation findings were described earlier.

REAP should also facilitate collaboration with outside educational research agencies such as the Educational Testing Service (ETS). For example, a cooperative agreement with ETS could be established whereby promising new measurement approaches (such as a new test of pupil self-concept) could be field-tested at a number of Teacher Corps sites. ETS would benefit by having easy access to a nationwide cooperative population, while Teacher Corps would benefit by having additional important data about Teacher Corps projects and their relationship to broader national norms on an important indicator of pupil growth. Further, REAP could help worthy outside researchers gain access to Teacher Corps projects while also helping to establish ground rules governing such efforts.

V / NECESSARY TASKS OVER THE NEXT FEW MONTHS

Should Teacher Corps accept this evaluation design (or some modification of it), a number of tasks should be undertaken within the next few months. These steps would help to ensure that Teacher Corps/Washington and OPBE derive maximum benefit from their documentation and evaluation resources.

The first task would be to secure sufficient fiscal resources to carry out this evaluation design. A closely related necessary task is the development of the independent evaluation RFP. The evaluation design described in this document has a number of implications for such an RFP. These implications pertain to the substantive focus of the outside evaluation effort, namely the National Process-Outcome Assessment described in Chapter III. This evaluation design also has considerable implications for the governance and collaboration structure of the outside evaluation. These implications are discussed in Chapter III of this report.

A third task would be to form the Reaction Panel as soon as possible. This would allow the group to advise Teacher Corps/ Washington during the final stages of RFP development and possibly to participate in the selection of the independent evaluator. It would be important that a member of the advisory group serve as a reader of proposals for this independent evaluation. The advisory group could also assist Teacher Corps/ Washington in the other developmental tasks. For example, it should play an active role in the expansion of the substantive framework described in Chapter III.

The fourth upcoming task would be to develop guidelines for proposal review which adequately reflect the conception of local program documentation and evaluation described in this report. For example, this report encourages Teacher Corps/ Washington to require local projects to develop a plan for effectively utilizing local project documentation and evaluation to enhance program development at the local site. Teacher Corps/Washington is also encouraged to play an active role in the negotiation process with local projects, so as to ensure that local program documentation and evaluation are given ample staff time and resources.

Finally, it would be helpful if Teacher Corps/Washington and the Reaction Panel could establish a subsequent work group or hire an outside contractor to work with selected members from local projects to develop an initial documentation framework and devise local documentation procedures. Such a work group should include project members and others experienced in both ethnographic documentation and local project management. The group would need to prepare exemplary materials and a set of training procedures. The group should also provide training for local project evaluator/documentators some time during the summer of 1978. The training should acquaint local evaluator/documentators with quality examples of evaluation and documentation materials and provide the technical assistance which would help local project evaluator/documentators to improve their own plans.

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APPENDIX

Major Evaluation Issues

The Evaluation Task Force identified some major issues which any design for the evaluation of the new Teacher Corps national effort would have to address. These issues have been organized within four categories as follows:

Issues related to information needs, types of questions to be asked, and audiences to be served.

Issues related to the purposes/pay-offs of the evaluation.

Issues related to the methodologies employed in the evaluation efforts.

Issues related to the administrative structuring of the evaluation efforts and the relationship of the evaluation efforts to Teacher Corps/Washington.

The consensus of the Task Force was that each of these sets of issues is very important in developing a successful evaluation design.

Issues Related to Information Needs, Types of Questions to be Asked, and Audiences to be Served

Numerous role groups are relevant audiences for the Teacher Corps evaluation efforts. These role groups include:

The local Teacher Corps project

The local school district (LEA)

The cooperating university (IHE)

The community

Teachers and teacher organizations

The state education agency (SEA)

Teacher Corps/Washington

Federal policy-makers at U.S.O.E., H.E.W., in Congress

Researchers (evaluation specialists, organizational theorists, teacher effectiveness researchers, etc.)

Each of these audiences has several sub-groups. For example, the "local district" as an audience could really consist of the Superintendent, area administrators, the principals, budget managers, teachers, in-service specialists, community advisory group representatives at the schools, etc. Moreover, these role groups at a site that has a Teacher Corps project have different information needs than would the same role groups in non-Teacher Corps districts. At the federal level, the needs of U.S.O.E. bureaucrats may be quite different from those at H.E.W. or the needs of Congress. The issues which the identification of audience raises are: (1) How similar are the informational needs for these various audiences? and (2) Can all the needs of all the audiences be met or do some priorities (of audiences) need to be established? On what basis should priorities be established?

To explore these issues, the Task Force began to identify evaluation questions which were relevant to the first year of operation for Program 1978 projects. Had time permitted, a similar set of evaluation questions would have been generated for years 2-3 and 4-5 although the major purpose of this activity during the first meeting of the Task Force was to determine such things as the similarity of informational needs across audiences rather than to develop an exhaustive set of questions.

Several paradigms were used to generate questions about the first year of the program. One approach was to generate questions using the four major outcomes prescribed in the legislation (school climate, educational personnel development system, institutionalization, and demonstration). A second approach was to generate evaluation questions based on the first-year tasks either prescribed in the guidelines or likely to be carried out by projects. A third approach was open-ended but included looking at projects in terms of the roles they play, such as: a temporary system trying to influence "regular" institutions, a teacher training effort, a managed project effort, and a cultural milieu. Figure 6 represents the broad variety of questions generated by the Task Force.

The set of questions raises several important issues. First, how to prioritize questions. Questions could be prioritized according to evaluation purposes, audiences, judged importance of the information, or other criteria. Second, will the questions in fact lead to solid clarification of the issue of the commonality of information needs across audiences? Several lessons seem to have been learned from the process of explicating questions. There are numerous evaluation questions one could ask and many audiences which might want this information. Moreover, our perspective for generating questions was still too narrow--other paradigms are needed. For example, when Dr. Wendy Harris described the policy questions to which her evaluation design was addressed, it was clear that her issues were

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FIGURE 6

Evaluation Questions Concerning the First Year for Program 78

1. What kinds of interorganizational relationships develop?
2. What is the nature of the temporary system which develops?
3. How are elements of the temporary system institutionalized?
4. How are projects managed? (Communication, Program, Finance, Documentation, Decision-management, Role clarification, Conflict and Crisis resolution)
5. What are the anticipated role groups and their functions?
6. What is the nature of the developing team, what is the variety, how different from previous cultural patterns?
7. To what extent did existing role-patterns co-opt the developing process?
8. What OD strategies are used in program development?
9. How can I do a needs assessment that is worth a damn?
10. Does the process successfully interrupt the status system?
    --in structure?
    --in process?
    Is the circle of decision-maker widened?
11. Does a plan for school improvements emerge and is the staff development program related to that plan?
12. How well is the school and community described? How are new program goals identified and the discrepancy translated into operational objectives?
13. What types of planning activities are conducted? Variety? How closely do they match objectives? Is the planning process completed? How closely do these relate to Teacher Corps objectives--the four outcome areas, and the guidelines?
14. Do the projects plan the same stuff as they did under old guidelines, or is it different? Is previous Teacher Corps project experience related?
15. What are the configurations of the cultural milieu that is Teacher Corps? the Teacher Corps projects?
16. Is Teacher Corps unique and is it transportable?
17. Are personnel and time/budget requirements capable of being supported by local efforts without Teacher Corps funding?
18. What institutional commitment indicators are most related to institutionalization of the project?
19. What are the planned organizational/career support mechanisms for local project staff?
20. How were project sites selected? What kinds of sites were selected?

FIGURE 6

(continued)

What process was used in selecting the site (shared decision-making)?

21. What factors/features are planned to improve the school climate? What evidence is there that these factors/features will improve the school climate?

22. What kinds of inservice are planned so as to improve learning of low income children? Incentives/career rewards for Teacher Corps participation? Include: multicultural, shared decision-making, diagnostic/prescriptive, collaborative, community participation.

23. How were the IHE faculty selected to participate in Teacher Corps? How receptive are they to change? What is their knowledge/experience in key areas?

24. What factors--or how is school climate defined? By various participants?

25. What is planned to effect the improvement of school climate?

26. How (process for) are conflicts to be dealt with? Governance? Decision-making?

27. What provisions are planned for mid-course changes?

28. What is the "quality" of the "products" planned for the five-year cycle? People? Changes made?

29. What is the planned relationship of the "evaluators" and LEA participants, including national Teacher Corps?

30. (Generic) What is the receptivity/built-in flexibility to change according to evaluation? (from local project, nation) Mechanisms for feedback internally and externally?

31. What project/programs are planned to utilize/instruct the community?

32. Was there systematic comprehensive planning for change? How is this evident? What is the baseline for change?

33. What is the evidence needed to predict school environment change/improvement? What are the expectations during the next four years?

34. How will the LEA (Treas., Admin., Comm.) needs for inservice be determined in order to improve the school environment?

35. What are the specific criteria (milestones for project development) developed by Teacher Corps for its projects? For example: Needs assessment.

36. To what extent and how does the project meet the specific criteria set forth by Teacher Corps/Washington?

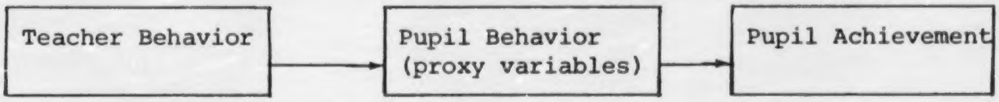
37. Is the extent to which a project meets Teacher Corps planning criteria related to the implementation of the project's design?

somewhat different from the issues the rest of us identified. This raises the issue of whether questions generated by H.E.W., Congress, or other role groups would also be interestingly different from our list of questions. Finally, the process of framing questions sharpened our awareness of issues concerning purpose, methodology, and administration of the evaluation efforts.

Issues Related to Purposes/Pay-Offs of the Evaluation Efforts

There are a number of important issues related to the purposes and payoffs for the evaluation efforts. A critical issue is the extent to which the evaluation represents an external judgment of the project. On the one hand, evaluation could be seen as essentially documenting the project activities and outcomes, with little expectation that any judgment would be made about the project. On the other hand, the purpose of evaluation could be seen as making an external judgment about the project. A related issue concerns the extent to which projects will be held accountable for bringing about improvements in pupil achievement. This problem is a classic problem in teacher training programs and their evaluations. Teacher behavior is assumed to influence pupil behavior, which in turn might influence pupil achievement. This relationship can be portrayed as follows:

FIGURE 7



One resolution of this issue is to utilize the research on teaching effectiveness as a means of identifying teacher behaviors which, based on research, are assumed to enhance pupil achievement. Projects such as Teacher Corps would then be accountable only for creating these desired teacher behaviors. A second approach would be to hold the training program accountable not only for teacher behaviors but also for pupil behaviors which would serve as "proxy" variables in place of pupil achievement measures. A final approach would be to hold the teacher education program directly accountable for gains in pupil achievement. In any case, the question remains as to the extent to which Teacher Corps programs should be held accountable for changes in teacher behavior, pupil behavior, and/or pupil achievement, and upon what basis this accountability is justified. The related issue concerning the appropriate measurement of these variables will be discussed later in the paper.

Another major issue concerns the definition of program purposes to which the evaluation would then be linked. One approach to this definition of program purposes is an inductive one. Local projects would evolve operational definitions of concepts such as school climate and an educational personnel development system. These concepts would have a close "reality match" and could emerge out of program needs and designs. A counterpart definition of program purpose might utilize the inductive definitions of these concepts but would give them national meaning and standards. This latter approach would recognize the legitimacy of a national purpose and accountability for the overall Teacher Corps program and for concepts such as school climate and educational personnel development system. An important evaluation question evolves from these issues, namely, how was the meaning of critical concepts clarified and to what extent is the national definition of such concepts binding upon local projects?

Another set of evaluation issues relates to the purposes Teacher Corps/Washington would have for an evaluation. An informal examination of the purposes which Teacher Corps has previously had for evaluations would include the following purposes:

1. _An aid to technical decision-making_. Previous evaluations have helped Teacher Corps decide that certain program components needed revision, and management decisions related to the improvement of these components have been made.
2. _A political asset_. Several evaluations were used to show the federal and congressional constituencies that Teacher Corps had heretofore been doing a superb job, as reflected in the evaluations, and should now be given support for its current efforts.
3. _A rationality force_. Previous evaluations have encouraged Teacher Corps to identify decision options and weigh these on the basis of data.
4. _A purpose clarifier_. Previous evaluations have also helped Teacher Corps clarify the meaning of critical concepts such as the five thrusts and have helped to identify indicators of these concepts which not only aided data collection in the field but also clarified

the meaning of these terms within all levels of Teacher Corps efforts.

5. A respectability process. By pointing out that Teacher Corps is a heavily evaluated program, Teacher Corps gains respectability in the eyes of relevant audiences. If the Rand Corporation, for example, were conducting an evaluation, the respectability would even be greater despite the technical findings of the evaluation. Who could claim that Teacher Corps was not an important educational program if a respectable evaluator found Teacher Corps evaluation at least adequate for its purposes?
6. A means for facilitating policy analysis. Evaluations have helped Teacher Corps and the Office of Education clarify and decide upon longer range policy options in a teacher education.
7. A basic research vehicle. Recent large-scale evaluations of federal education programs have constituted a large percentage of the basic research that has been done in the last ten years on a number of important educational issues. This research has made a very significant contribution to the research literature in many fields in education and social science.

This listing of purposes from previous evaluations raises several interesting issues such as (1) to what extent should each of these purposes be included in the current evaluation design, and (2) what are the implications of each of these purposes for the evaluation process, outcomes, utilization, and administration of proposed evaluation efforts.

A similar analysis of purposes could be done for local project evaluation efforts. For example, should the local evaluation be only a documentation, or should it also be a purpose clarifier, or finally, an aid to decision making? Moreover, should the decision as to the role of the evaluation within the local project be essentially a local project decision or one that is influenced by Teacher Corps/Washington? Related to this is the question of the extent to which the local evaluation may serve as a political asset, clarifier of purposes, an aid to decision making, or a rationality force within the local project.

Another set of issues relates to the pay-offs for various audiences of the proposed evaluation design. One way to frame the issue is to ask, what is the pay-off for local projects of any nationally oriented evaluation? Conversely, one could ask what is the national pay-off in the whole Teacher Corps endeavor? For example, should the national interests be satisfied if local projects develop programs and define success based primarily upon their own criteria of success? This raises the issue of what Teacher Corps/Washington and other federal interests wish to achieve through Teacher Corps projects and how evaluation efforts are related to this national interest.

Issues Related to Evaluation Methodology

There are a number of important issues related to the evaluation methodologies to be selected. The Task Force members strongly believed that the basis for documentation and evaluation efforts ought to be a rich, qualitative understanding of the emerging dynamics within each local project. The need for a rich understanding of the dynamics of local projects, in turn, raises a number of methodological issues. The Task Force was strongly attracted to the use of ethnographic techniques for acquiring this richer understanding. One of the methodological issues, then, will be the problem of establishing an appropriate balance between open-ended, unstructured inquiry into the dynamics of the local setting that is balanced by a more structured and focused inquiry. As one of the Task Force members pointed out, a heavy emphasis on the use of preselected questions limits the ethnographers' openness to identify and pursue other important dimensions of the dynamics within each local project. A related issue is whether a sufficient number of "good" ethnographers/documenters can be attracted to work with local projects.

Whether ethnographic or other measurement strategies are used, the general problems of validity and reliability of the measures remains a critical issue. Considerations of what can be reliably and meaningfully measured and what ought to be measured are closely interrelated topics. One Task Force member recommended the formation of a measurement panel which would advise the Office of Education and Teacher Corps about the prospects and constraints of various methodologies, particularly the methodological and inference problems related to the relationship of teacher behavior and pupil behavior to pupil achievement.

Issues of reliability, validity, and generalizability extend across all methodological approaches to the evaluation of local projects. While specific resolutions of these issues differ according to methodology, the issues pertain as much to ethnographic studies as to large-scale, quantitative studies. One special focus of concern within federal evaluations, however, has been on measurement and generalizability related to linking teacher behavior, pupil behavior, and pupil achievement. Here the issues have been widely discussed and analyzed, and, currently, no easy solutions exist. As discussed previously, the related issue of what projects are to be accountable for (concerning the teacher behavior to pupil achievement continuum) is also important. A primary issue for this evaluation design remains how to develop evaluation methodologies that have even an adequate level of respectability in terms of reliability, validity, and generalizability.

Related to the reliability, validity, and generalizability concerns is the problem of "program fairness" of the evaluation. The Marsh study which evaluated the preservice teacher education efforts of Teacher Corps projects had a difficult time identifying common training goals across the twenty Teacher Corps projects studied. It is likely that the training goals within inservice teacher education programs will have even greater diversity. This diversity raises an important dilemma for evaluations of Teacher Corps. Either the evaluations can utilize specific training goals of each Teacher Corps project, or they can try to identify common training goals across at least a subset of all projects. Utilizing each project's local training goals has the best "program fairness" qualities, but makes it difficult to study the effectiveness of this training across projects or even to identify generalizable program conditions or features which are strongly related to success in meeting these training goals. Utilizing a common set of training goals across projects is often less "program fair" to each project because the generalized set of program goals only loosely match the specific goals utilized by each local project.

It will also be difficult to agree on the units of measurement and analysis to utilize in looking at local projects. For example, in looking at the dynamics of the local Teacher Corps process, it will be difficult to tell how large the domain of relevant groups will be. Each project would directly involve some approximation of the following:

Fifty to sixty teachers
Four Teacher Corps interns
X number of aides
Other preservice programs at the school
LEA and support service people
One or several teacher organizations
One or several IHEs and selected faculty
A community council and an unknown number of community members who directly participate in the project

An even wider network of people and organizations will be indirectly involved in the project. One issue becomes determining how many institutions and people, with their corresponding interactions and relationships, ought to be included in the documentation in order to gain a good understanding of the real action dynamics at a local project. A related issue is whether the documentation/evaluation ought to focus on process and outcome variables associated with individuals, groups, and/or institutions.

There is also the question of how to utilize research literature from related fields, such as organizational change, in preparing to study local projects. For example, Ronald Corwin has identified a number of organizational change variables and hypotheses which could provide exciting lines of inquiry in studying local projects. The methodological issues are what classes of variables should be utilized in evaluation efforts and to what extent should there be a theoretical base for the evaluation/documentation.

Whatever the unit of analysis and whatever the extent of the theoretical base, a significant methodological issue remains: how to categorize data gathered at local project sites in order to generalize across sites. This is not only a management or administrative issue, which will be discussed in the next section of this paper, but it is also a methodological issue. The categorization of data across sites has reliability, validity, and generalizability dimensions. It also has a believability or credibility of the data dimension. For example, it is not clear whether federal policy-makers and the Congress would give much credence to findings concerning the impact of Teacher Corps projects which were based on data gathered by documenters/evaluators employed by the local project.

Finally, the utilization of documentation and evaluation, both by the local project and by Teacher Corps/Washington, is a methodological as well as a management and purpose pay-off issue. The use of evaluation and documentation data for program interventions disturbs the measurement process. On the one hand, project participants may be more willing to give their time and energy to evaluation efforts when they see that the evaluation/documentation may be of immediate usefulness to them. On the other hand, participants may have reservations about revealing certain information because of the "politically sensitive" nature of the information. Moreover, participants may misrepresent events and motives in order to make a good showing in the eyes of their colleagues when it is clear that the information will be made public in the near future.

Issues Related to the Administration of the Evaluation Efforts and the Relationship of Evaluation Efforts to Teacher Corps/Washington

A fourth set of issues relates to the administration of the evaluation efforts and the relationship of these evaluation efforts to Teacher Corps/Washington. The Task Force examined this set of issues using the recent monograph by Tom Fox entitled, "Limitations of a Standard Perspective on Program Evaluation: The Example of Ten Years of Teacher Corps Evaluation." Fox concluded that previous evaluations had not been helpful to Teacher Corps/Washington, while at the same time they had been carried out with high professional standards. Several specific issues identified by the Task Force included the timeliness of the evaluation to the decision-making needs of the federal government. For example, in previous evaluations, the evaluation questions were posed as research questions rather than as policy questions, which in turn made it difficult to use the studies for policy purposes. Finally, the Task Force wondered whether the evaluation needs of Teacher Corps/Washington were similar enough to the needs of other federal policy-makers so that a common evaluation effort would serve many sets of needs.

A major administrative issue is the appropriate linkage between local evaluation efforts and national evaluation efforts. Two issues are especially important in this context: how to link local and national evaluation efforts conceptually, and how to link them administratively. The

Task Force identified three broad evaluation functions or levels:

1. To assist local project development
2. To serve as a formative evaluation for Teacher Corps/Washington
3. To serve as a summative/policy evaluation for multiple audiences

The question of local to national linkage was discussed in terms of these three functions or levels. An important procedural issue for the Task Force was whether to define these functions or levels as administrative units for the overall evaluation and then to define the question of data collection procedures and outcomes based on accepting these initial administrative differences, or whether to identify the important evaluation questions, and then, based on an analysis of these questions, to determine the administrative structures needed.

In any case, a critical issue for the evaluation design will be to structure the local evaluation so that it is, indeed, helpful to local program development. As previously discussed, this is an issue of whether the local evaluation should document, clarify, or more directly intervene in local program activities. It also raises the issue of whether the local evaluation should be influenced by some explicit national approach to program development or whether it should be based exclusively on the information needs of each local project as locally defined. For example, Teacher Corps/Washington may want to encourage greater use of certain organizational development principles at local projects. It could also do this through its developmental assistance and evaluation assistance efforts. Finally, there is the question of how effective any local evaluation can be given the limited available funds for this purpose.

For a formative evaluation to be especially helpful to Teacher Corps/Washington, several issues must be addressed. One of these issues is the question of who at Teacher Corps/Washington would be the individual or group that would receive and directly utilize the evaluation. Secondly, there is the issue of how to create a fruitful dialogue between Teacher Corps/Washington officials and the evaluators so that Teacher Corps/Washington understands the results of the evaluation and can see the potential program implications of these results. Related to this is the question of how the evaluation results can be merged with insights gained from other federal programs and from the research literature. This integration would provide Teacher Corps/Washington with a more sophisticated view of local programs and national technical assistance efforts as well as the decision options it has in these areas.

There are also important administrative issues related to a summative/policy oriented evaluation of the Teacher Corps project. One issue here is to frame the evaluation so that it can directly inform federal decision-makers about policy options rather than to frame the evaluation as a set of research questions yielding nebulous policy-oriented information. The evaluation may be designed to inform federal policy-makers about their options concerning Teacher Corps as a specific federal program. One concern here is to determine what federal policy-makers would count as success for the Teacher Corps program and, in general, what federal policy-makers really want to know about Teacher Corps operations and outcomes. In this context, it isn't clear that the alternative evaluation styles which Tom Fox suggests would be any more helpful to policy-makers than were the evaluation styles of the previous Teacher Corps evaluation studies.

The summative/policy evaluation might also be designed to inform federal policy-makers about desirable teacher education options which would generalize beyond the Teacher Corps and a specific program. This also raises a number of important evaluation issues such as how "planned variation" in teacher education program designs can be established so that the evaluation design moves away from comparing Teacher Corps against some benign "control." Another important issue is whether teacher education policy options can be formulated at this time and whether the federal bureaucracy will maintain an interest in these questions over a long enough period of time so that the Teacher Corps evaluation can inform these decisions.

Any federally funded evaluation, whether it is designed to aid a local project, provide formative information to Teacher Corps/Washington, or serve as a summative/policy evaluation, is subject to several important federal constraints. First, there is the issue of the timing of the federal contract so that the evaluation can begin at the appropriate time in the life of the Teacher Corps project. It currently takes approximately seven months to develop a federal RFP, secure a contractor, and begin the evaluation effort. This length of time jeopardizes collection of baseline data with well-developed instruments or utilizing well-trained ethnographers based at a local site. OMB clearance regulations also constrain the flexibility with which any evaluation data can be collected. The fundamental issue, then, is how various evaluation efforts can be designed so that they collect important and timely data while also meeting federal constraints.

Another important administrative issue is how to develop pluralistic evaluation approaches. Pluralistic evaluation efforts would include a variety of conceptual frameworks and data collection strategies. It is important to balance use of alternative evaluation approaches with maintenance of a somewhat integrated picture of Teacher Corps activities. The question of integration is relevant to both the design of evaluation efforts and to the utilization of evaluation information by Teacher Corps/ Washington. A related question is how to involve researchers across the country who may wish to study Teacher Corps projects but who don't necessarily receive federal evaluation monies to conduct these studies. Multiple studies of Teacher Corps could be useful not only to Teacher Corps decision-makers but also to the research community.

Finally, there is the question of how to structure the several phases of the overall evaluation effort. It is important to collect baseline data and to provide continuity concerning summative evaluation data collection activities while at the same time to allow an emerging understanding of Teacher Corps program dynamics to help define and redefine subsequent evaluation variables, data collection strategies and results. The beginning teacher evaluation study (BTES) in California is a relevant model. While the evaluation was initially designed to take place over a number of years, it was shaped by a continual dialogue between researchers and policy-makers. Such dialogue could provide the basis for the continual reshaping of policy and evaluation questions as well as data collection strategies and policy implications.

Summary

These issues have been summarized on the following pages. Like the previous discussion, the summary has been organized around four categories of issues.

A COMPOSITE LIST OF ISSUES

A. Issues Related to Information Needs, Types of Questions to Be Asked, and Audiences to Be Served

1. How similar are the information needs for various audiences?
2. Can all the needs of all the audiences be met or do some priorities (of audiences) need to be established? On what basis should such priorities be established?
3. What evaluation questions are most important to answer? What criteria should be used to identify this prioritizing of questions?
4. How can evaluation questions which could be generated by other role groups (such as Congress) be included in the pool of questions to be considered for inclusion in the evaluation?

B. Issues Related to Purposes/Pay-Offs of the Evaluation Efforts

1. To what extent should the Teacher Corps evaluation represent an external judgment of the Teacher Corps program, or certain dimensions of the program?
2. What is Teacher Corps/Washington accountable for in terms of program outcomes?
3. To what extent is Teacher Corps/Washington accountable for bringing about changes in pupil achievement, pupil behavior, and/or teacher behavior?
4. Will the ultimate definition of concepts such as school climate or education personnel development system be based on local project interpretations or should Teacher Corps/Washington provide a national definition? To what extent would the national definition of such concepts be binding upon local projects?
5. What purposes ought the overall evaluation effort have for Teacher Corps/Washington and for local projects? What characteristics ought to be incorporated in the evaluation design to increase the likelihood that each selected purpose will be carried out?
6. What should the local project pay-offs be for any nationally oriented evaluation?
7. What is the national pay-off in the whole Teacher Corps endeavor? What does Teacher Corps/Washington or other federal groups wish to achieve through Teacher Corps?

C. Issues Related to Evaluation Methodologies

1. How can a rich, qualitative study of local project dynamics best be achieved? What is the best balance between open-ended and pre-structured inquiry? Can a sufficient number of "good" ethnographer/documenters be identified and/or trained?
2. How can adequate reliability, validity, and generalizability be obtained for all measurement efforts?
3. What are the methodological possibilities and constraints of assessing teacher behavior, pupil behavior, pupil achievement, and especially their interrelationships?
4. What is the best balance between program fairness for local project goals and the desire to generalize across projects?
5. What units of measurement and analysis ought to be utilized in studying projects?
6. In what ways should a theoretical base guide the evaluation inquiry? What classes of variables ought to be utilized?
7. What approaches to organizing and categorizing local data ought to be utilized so that one can generalize across sites? What evaluation design features ought to be included to maximize our ability to generalize across sites?
8. What approaches/constraints ought to be included in the evaluation design to maximize the credibility/believability of the data and the evaluation with groups such as Congress?
9. If the use of evaluation data for program intervention disturbs the measurement process, what is the best trade-off between better long-term understanding of project dynamics and better program development achieved through intervention?

D. Issues Related to the Administration of the Evaluation Efforts and the Relationship of Evaluation Efforts to Teacher Corps/Washington

1. How can evaluation efforts be conducted to maximize their timeliness and usefulness to federal decision-makers?
2. What is the best linkage between local evaluation efforts and national evaluation efforts? How to link these efforts conceptually? How to link them administratively?
3. How should the local evaluation effort (and other evaluation efforts) support local program development? What role should the evaluation play vis-a-vis the local project (document, clarify, intervene)? Should Teacher Corps/Washington attempt to structure this in any way?
4. What individual/groups within Teacher Corps/Washington ought to be the prime utilizers of the evaluation?
5. What is the best way to structure the interaction between Teacher Corps/Washington and the evaluation efforts?
6. How can the evaluation efforts best be structured so as to enhance federal policy-making beyond Teacher Corps/Washington? What infor-

mation is needed about Teacher Corps as a specific federal program? What would policy-makers count as success? What types of evidence would persuade them?

7. What teacher education policy questions could the Teacher Corps program help resolve? Which ought these evaluation efforts help resolve? What evaluation designs would be helpful for studying these questions?
8. How can the various evaluation efforts be designed so that they collect important and timely data while also meeting federal constraints?
9. How can pluralistic evaluation approaches be obtained? How can researchers across the country be encouraged to study Teacher Corps?
10. How can the phases of the Teacher Corps evaluation best be structured?